

NBS Project Requests

Student Guide

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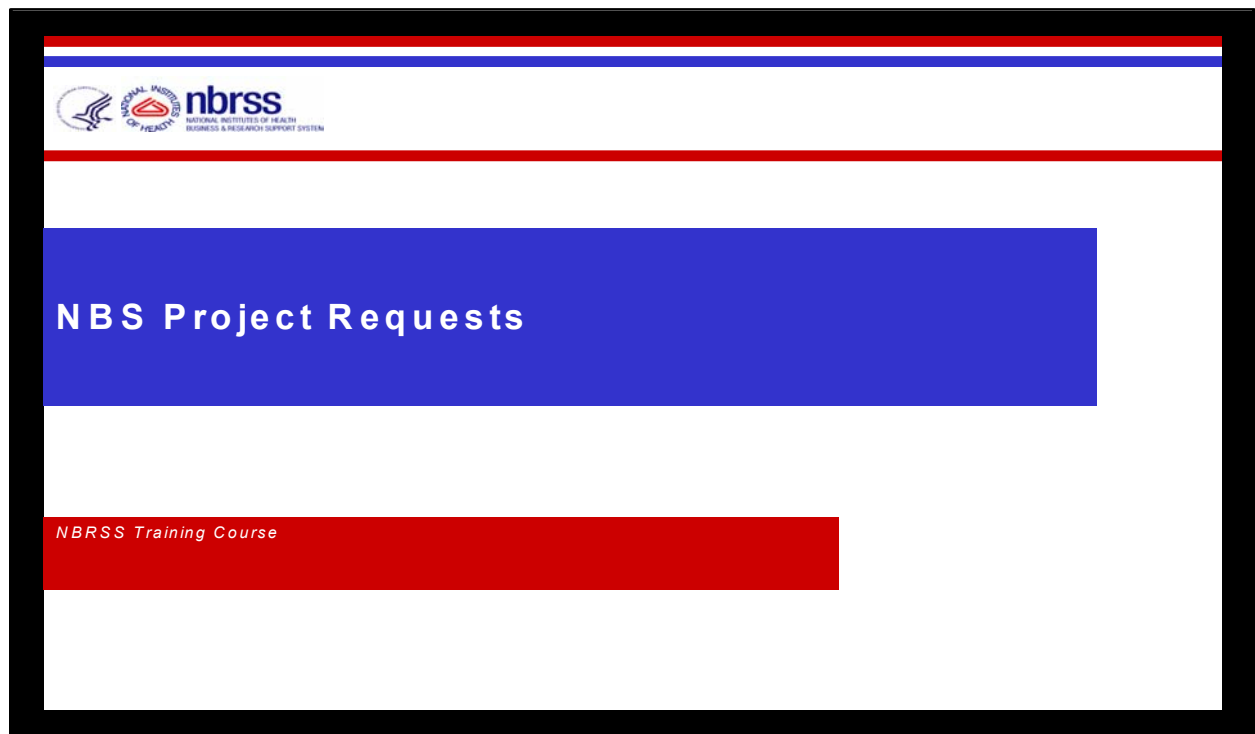
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NBS Project Requests



Working with Oracle Projects

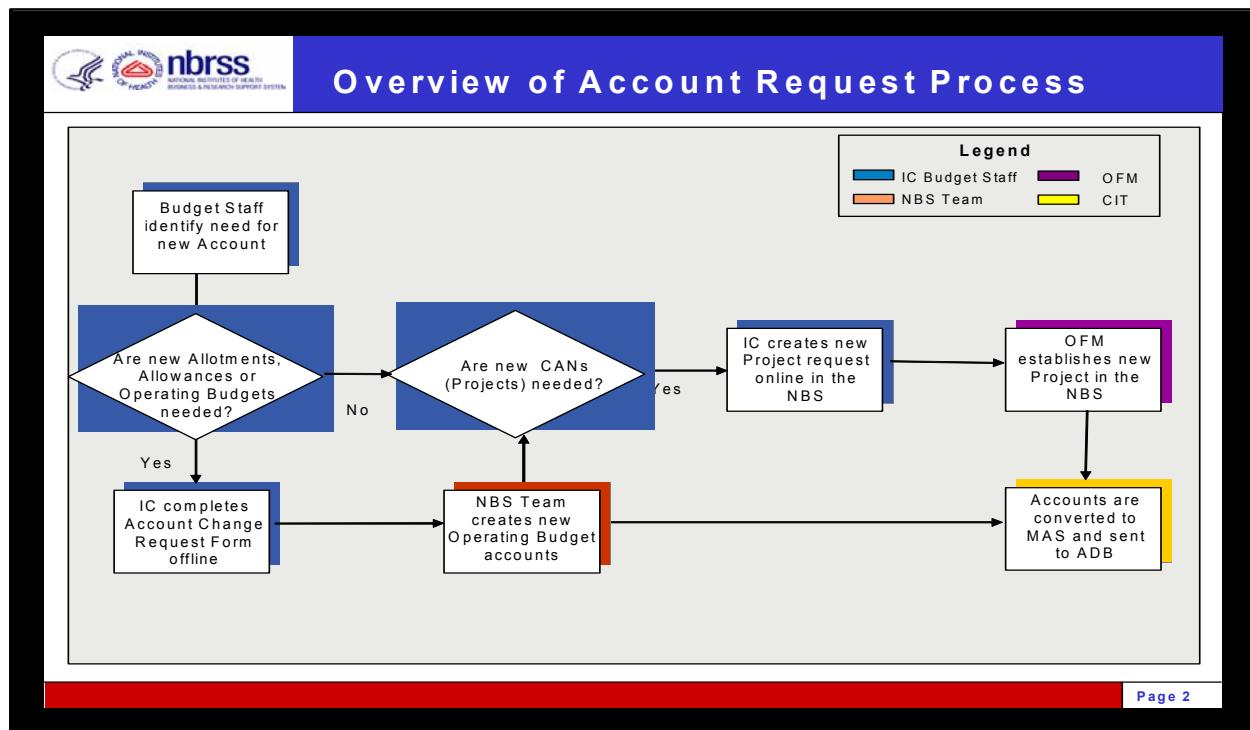


Working with Oracle Projects

- Oracle Projects will be used to create all new Projects (CANs) and deactivate existing Projects in the NBS.
- The NBS provides electronic forms to capture new Project and deactivation requests. The New Project request form replaces the current paper-based CAN request form and includes data for both systems' (ADB and NBS) needs.
- Once created, each new Project Account will be associated with the appropriate ACS string, translated into a CAN and its related explosion values, and transferred to the ADB to support legacy CAN-based systems through an automated process.
- Every Project that is deactivated in Oracle will be deactivated in the ADB through an automated process.

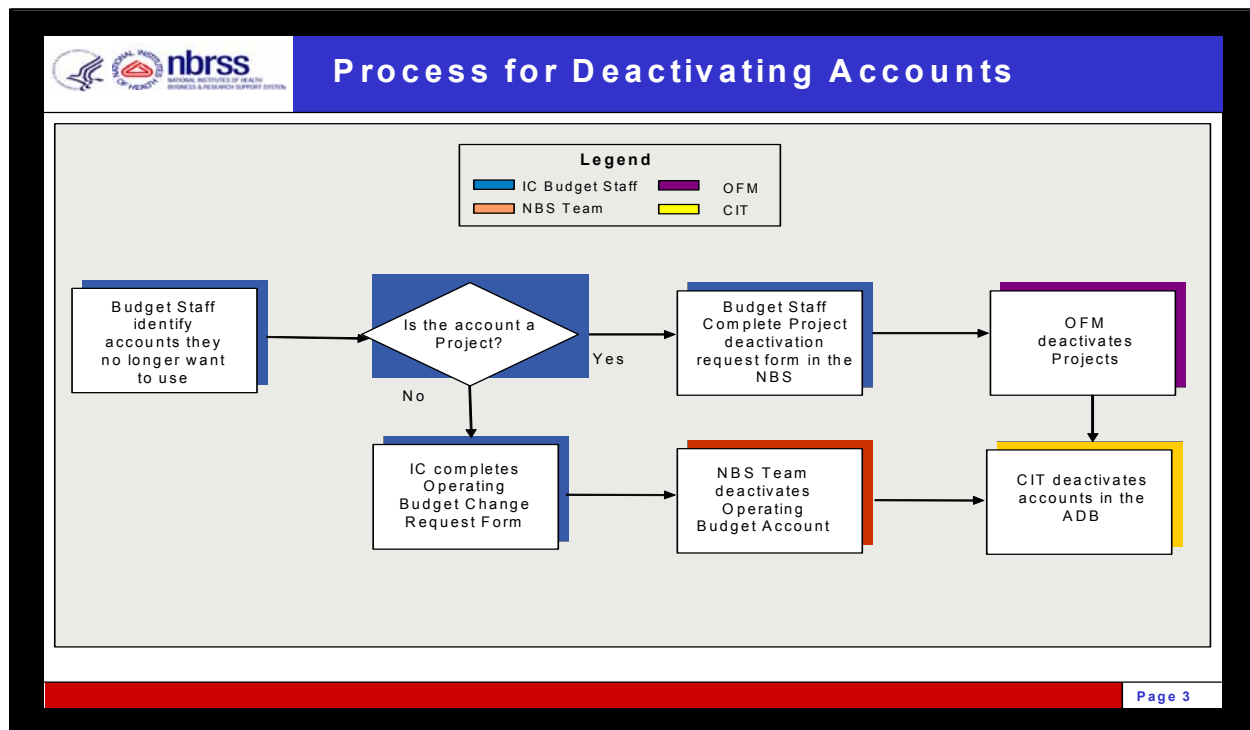
Page 1

Overview of Account Request Process




- All new account requests for both the ACS and the MAS are now made through the NBS.
- New Allotment, Allowance and Operating Budget requests will be made using an offline form that is available on the NIH portal <http://my.nih.gov> – NBRSS Budget/Finance Community. These sheets will be completed and emailed to the NBS Project Team, who will set them up in the NBS.
- New CAN (Project) requests will be made using an NBS application that you will be working with in today's training.
- Once an account is created in the NBS, an automated process will convert it into the MAS format and forward the legacy CAN to the ADB.

Process for Deactivating Accounts



- All account deactivations are also now made through the NBS.
- Allotment Allowance and Operating Budget deactivation requests will be made using form that is available on the NIH Portal. These sheets will be completed and emailed to the NBS Project Team, who will deactivate the requests accounts in the NBS.
- CAN (Project) deactivation requests will be made using the online NBS application.
- Once a Project is deactivated in the NBS, an automated process will forward the deactivation request to the ADB, where the related MAS CAN will be deactivated as well.

Project Account Maintenance Tasks

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Project Account Maintenance Tasks

IC Budget staff will be performing the following activities related to Projects:

- Entering new Project requests
- Receiving notification of approved Projects
- Checking the IC COA Log to determine status of Project requests
- Working with TASC to resolve problems with rejected projects
- Deactivating Projects that are no longer used

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Lessons on Requesting New Projects

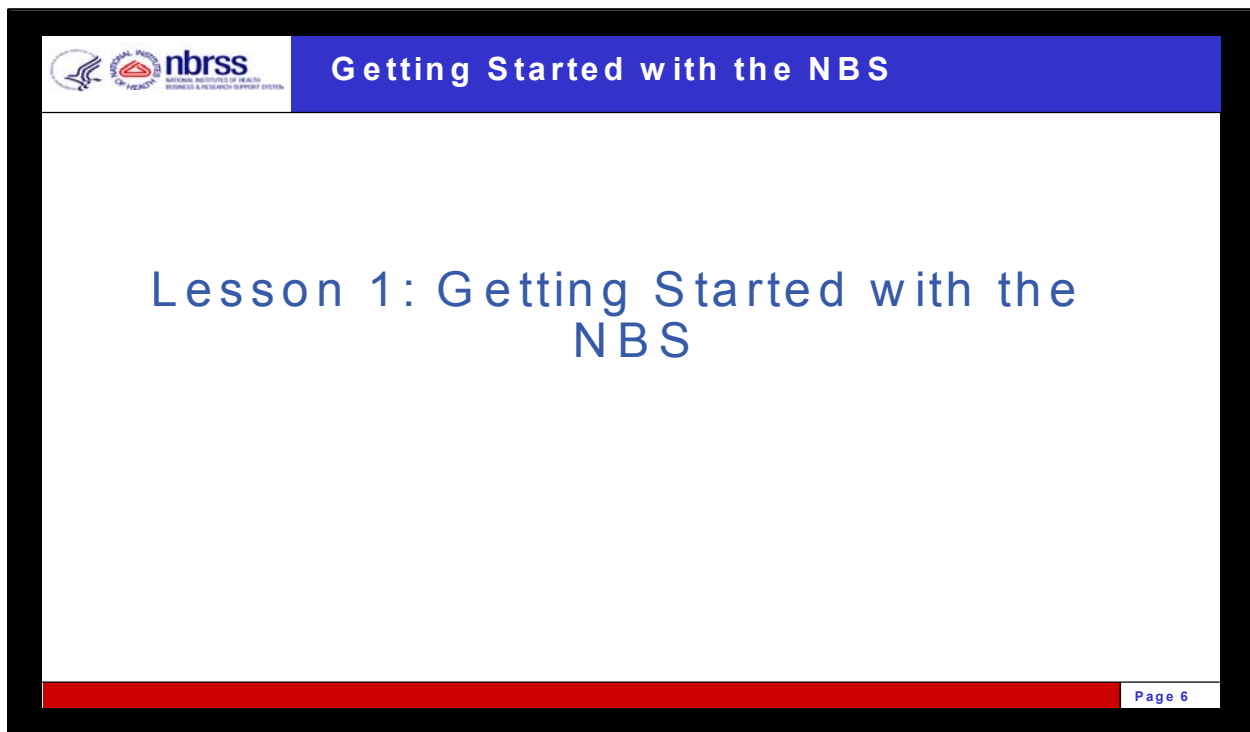
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SUPPORT SYSTEM

Lessons on Requesting New Projects

- The following lessons will present the detailed steps Budget Staff must perform to complete a project request:
 - Lesson 1: Getting Started with the NBS
 - Lesson 2: Establishing a new Project request
 - Lesson 3: Deactivating a Project
 - Lesson 4: Working with the Request Log
 - Lesson 5: Submitting or Deleting Pending Requests

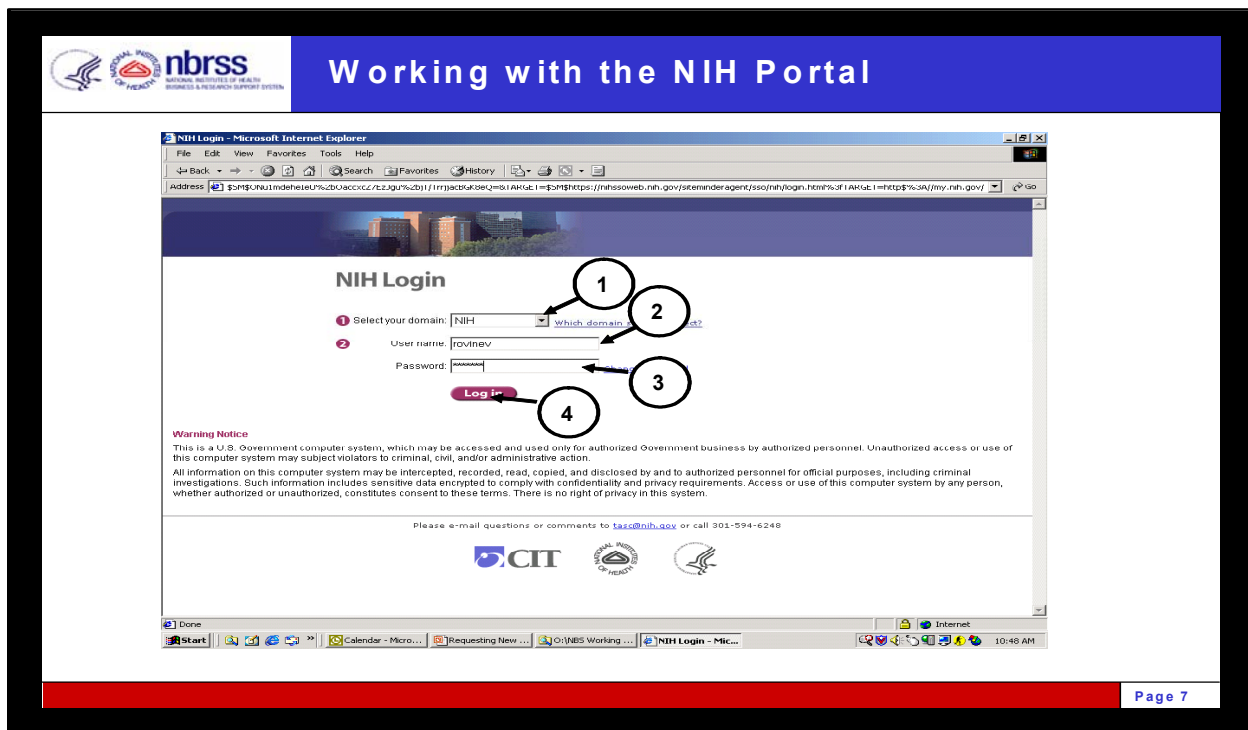
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Getting Started with the NBS



The image is a screenshot of a presentation slide. At the top left, there is a logo for the National Institutes of Health (NIH) and the National Business Research Support System (NBRSS). The logo consists of a circular emblem with a stylized 'H' and the text 'NATIONAL INSTITUTES OF HEALTH' and 'NBRSS' below it. To the right of the logo, the text 'Getting Started with the NBS' is displayed in white on a blue background. The main body of the slide is white and contains the text 'Lesson 1: Getting Started with the NBS' in a large, blue, sans-serif font. At the bottom right of the slide, there is a red horizontal bar, and the text 'Page 6' is visible in the bottom right corner.

Working with the NIH Portal

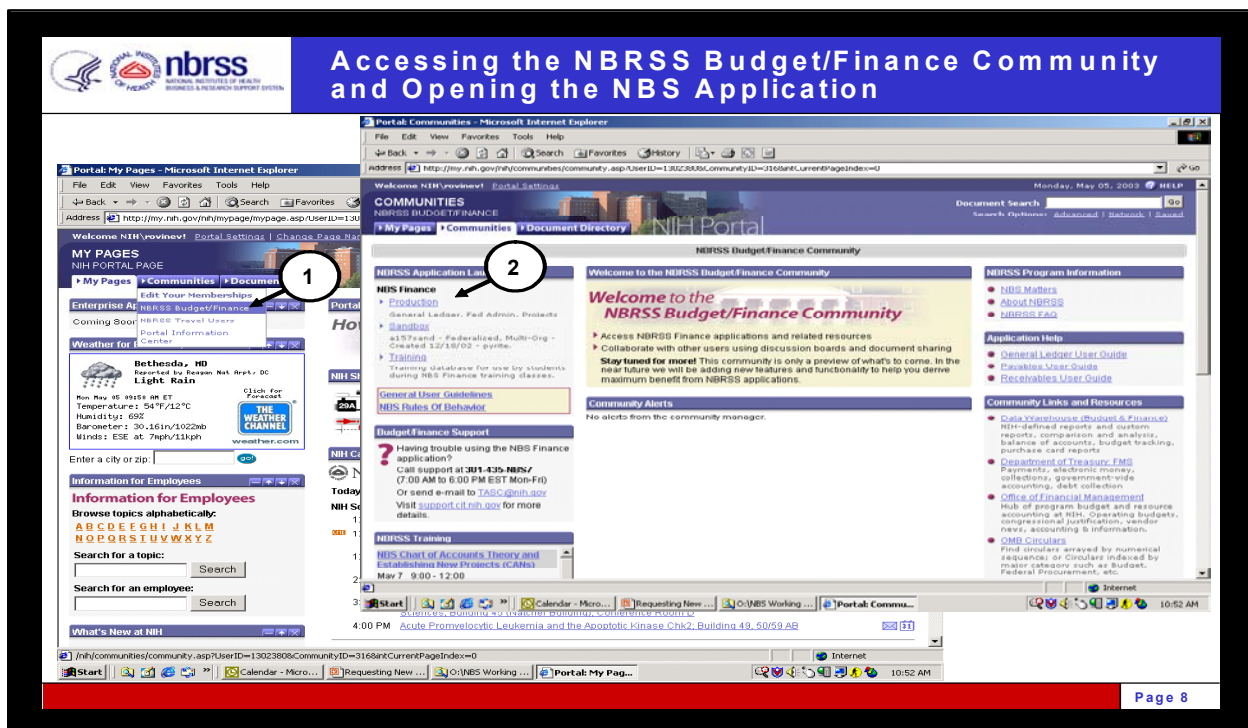


All NBS applications are accessible through the NIH Portal.

To login to the NIH Portal you will need to complete the following steps:

1. Select your NT Domain from the drop down list
2. Enter your User Name
3. Enter your Password
4. Click the Log in button

Accessing the NBRSS Budget/Finance Community and Opening the NBS Application



- The NIH Portal is organized by “communities”, which are specific functional areas of interest for different groups at NIH. Examples of communities are Travel Planners or NBRSS Budget/Finance.
- To access the NBS Oracle Projects module:
 1. Browse to the “NBRSS Budget/Finance” Community Page by clicking on the Communities tab and selecting NBRSS Budget/Finance from the list.
 2. Click on the applications link located on the upper left side of the page to access the NBS application. For today’s session, you will select the Training link. When you begin to use the system, you will select the Production link.

Accessing the NBRSS Budget/Finance Community and Opening the NBS Application

Accessing the NBRSS Budget/Finance Community and Opening the NBS Application

****WARNING****

This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

ORACLE
Applications

User Name

Password

Connect

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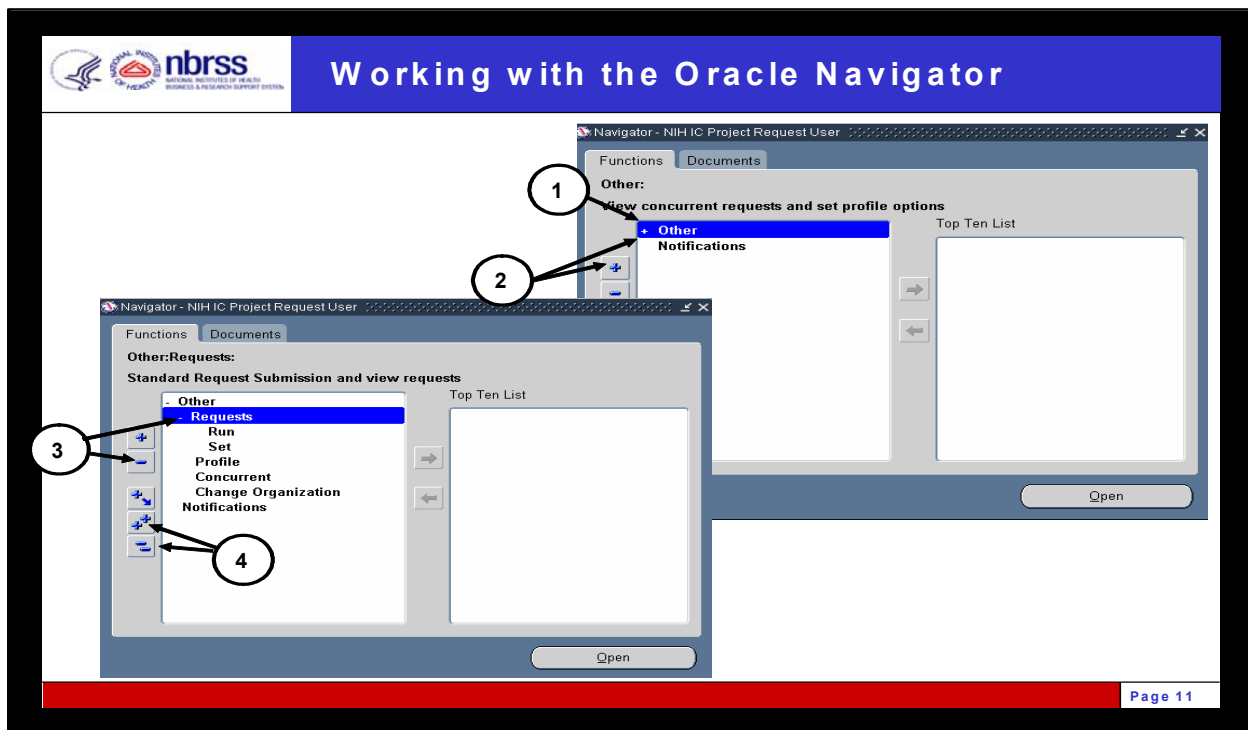
- The Oracle Login window is where you will enter your User Name and password.
- Use the [Account Request Form - General Ledger/Federal Administrator](#) to request access to the NBS. You will need to request the NIH IC Project Request User responsibility.

Selecting Responsibilities



- Once you have logged into the NBS, you must select a responsibility.
- A responsibility defines the NBS functions you can perform and the screens and data you can access. If you perform multiple functions within the NBS, you may be assigned multiple responsibilities.
- If you only have one responsibility, you will not see this window and will go directly into the Projects application.

Working with the Oracle Navigator



- The Oracle Navigator window lists all of the functions you can perform using the responsibility you selected.
1. Functions are arranged hierarchically within the function window. A plus sign next to a function indicates that there are related subfunctions under the function.
 2. To see related subfunctions either double click on the function or single click on the function and then click the plus sign on the left side of the window.
 3. To collapse subfunctions either double click on the higher level function or single click on the higher level function and click on the minus sign on the right side of the window.
 4. You can expand all functions or collapse all functions by clicking on the multiple plus sign or multiple minus sign.

Working with the Submit Request Window

The screenshot shows the 'Submit Request' window with the following sections and controls:

- Run this Request...** (Callout 1): Includes fields for Name, Parameters, and Language. Buttons: Copy..., Languages...
- At these Times...** (Callout 2): Includes a field for 'Run the Job' set to 'As Soon as Possible'. Button: Schedule...
- Upon Completion...** (Callout 3): Includes a checked checkbox for 'Save all Output Files', fields for 'Notify' and 'Print to', and a button for 'Options...'. Buttons: Help (B), Submit, Cancel.

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1. The Run this Request section enables you to select requests from a list of values.
2. The At these Times section enables you to schedule the requests to run at a certain time (not recommended for this process).
3. The Upon Completion section enables you to notify others of your request, or print your request.

Working with the Submit Request Window

The screenshot shows the 'Submit Request' window with the following components and callouts:

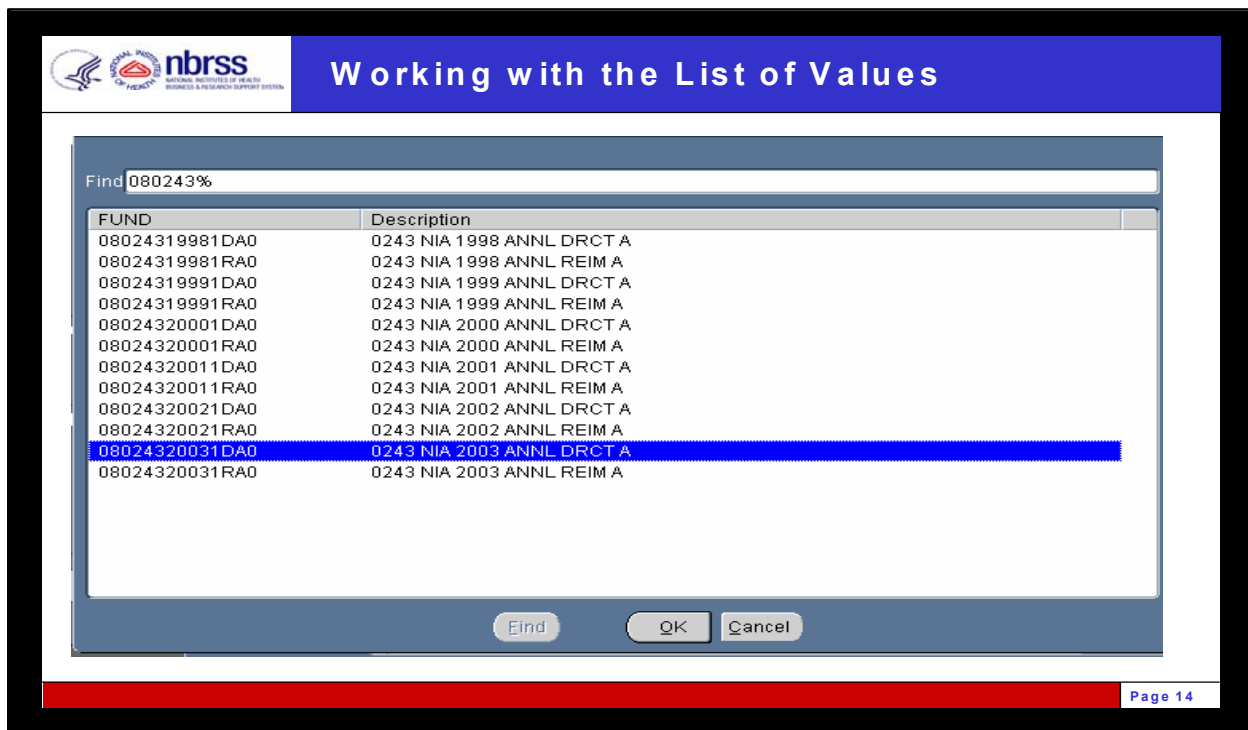
- 1**: Points to the 'Name' text field, which has a yellow background.
- 2**: Points to the 'Copy...' button.
- 3**: Points to the ellipsis (...) at the end of the 'Name' field.
- 4**: Points to the 'Submit' button.

The window contains the following sections:

- Run this Request...**
 - Name (yellow background)
 - Parameters
 - Language
 - Copy...
 - Languages...
- At these Times...**
 - Run the Job: As Soon as Possible
 - Schedule...
- Upon Completion...**
 - ☒ Save all Output Files
 - Notify
 - Print to
 - Options...
- Buttons: Help (B), Submit, Cancel

- The **Submit Request** window allows you to pull up and run requests within the NBS.
1. A field with a yellow background indicates that the field is required for data entry.
 2. The Copy button enables you to copy a previous request and use it as a starting point for a new request.
 3. The ellipses (3 dots) at the end of a field indicate that there is a list of values (LOV) you can use to select a desired value.
 4. The Submit button enables you to submit your request for processing.

Working with the List of Values



- If you click on a list of values icon, the LOV will appear. You can scroll through this list of values to locate your value, or you can use the Find field to narrow your search.
- The % sign in the Find field is a wildcard that will allow you to perform a partial search in the LOV. The % sign can be used before or after known values that a user is searching for to represent unknown values.

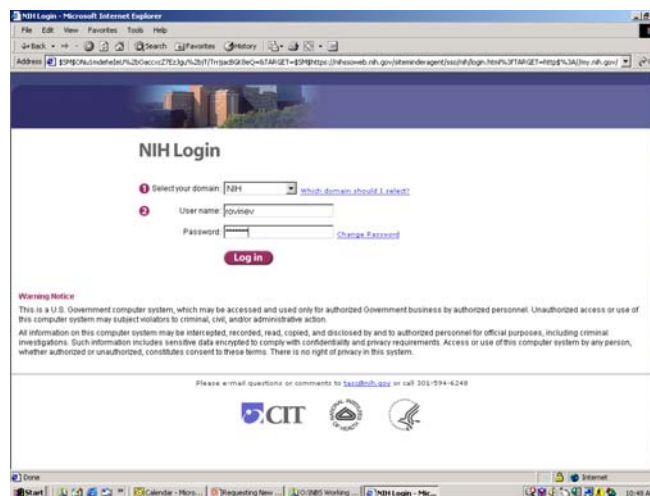
Accessing the NBS Oracle Projects Module

Purpose

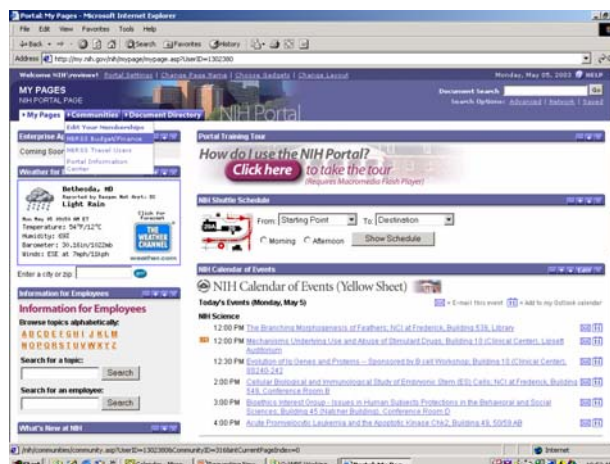
The purpose of this document is to describe how to access the NBS Oracle Projects module

NIH IC Project Request User

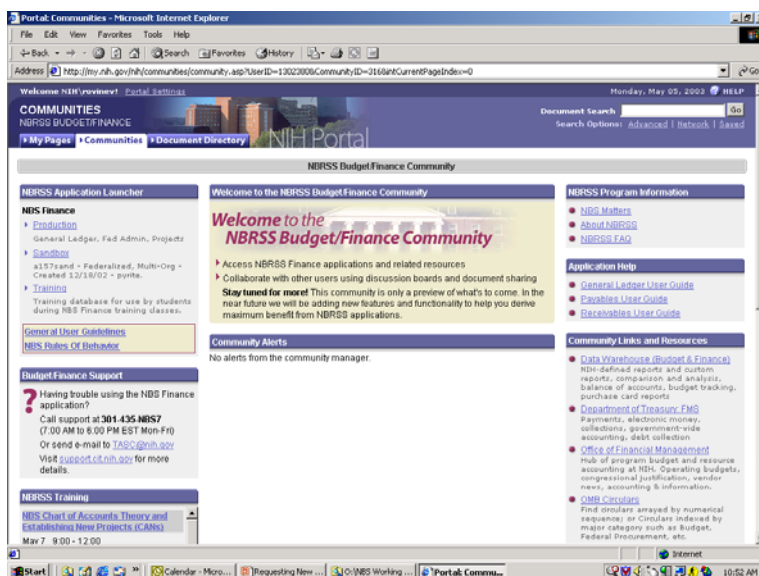
1. Launch Internet Explorer and type in the following web address: <http://my.nih.gov>.
2. Select your **NT Domain** from the drop down list and enter your User Name and Password.
3. Click the **Login** button.



4. Select the **NBRSS Budget/Finance** community from the **Communities** drop down menu.



- From the NBRSS Budget/Finance portal page, click on the **Sandbox** link to perform the classroom exercises.



- Enter your user name and password and then click on the **Connect** button. For the classroom exercise, use the user name and password provided to you by the instructor.

WARNING

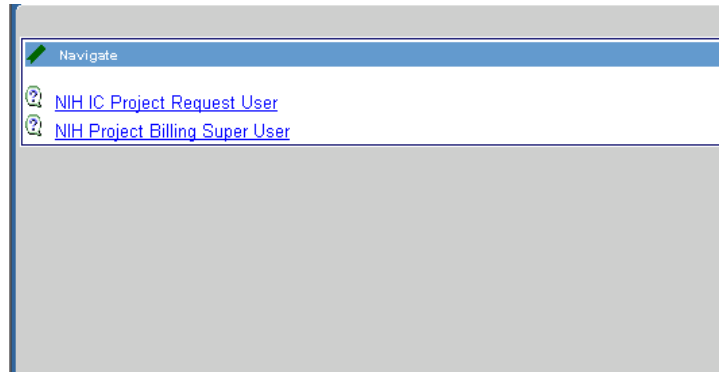
This is a U.S. Government computer system, which may be accessed and used only for authorized Government business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil, and/or administrative action.

All information on this computer system may be intercepted, recorded, read, copied, and disclosed by and to authorized personnel for official purposes, including criminal investigations. Such information includes sensitive data encrypted to comply with confidentiality and privacy requirements. Access or use of this computer system by any person, whether authorized or unauthorized, constitutes consent to these terms. There is no right of privacy in this system.

User Name

Password


7. Click on the **NIH IC Project Request User** link to select this responsibility. If you only have one responsibility, this responsibility will automatically open.



End of activity

Establishing New Project Requests

The slide features a blue header bar with the NBRSS logo on the left and the title 'Establishing New Project Requests' in white text. The main content area is white with the title 'Lesson 2: Establishing New Project Requests' in blue text. A red footer bar at the bottom right contains the text 'Page 15'.

 **Establishing New Project Requests**

Lesson 2: Establishing New Project Requests

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Lessons on Requesting New Projects



Lessons on Requesting New Projects

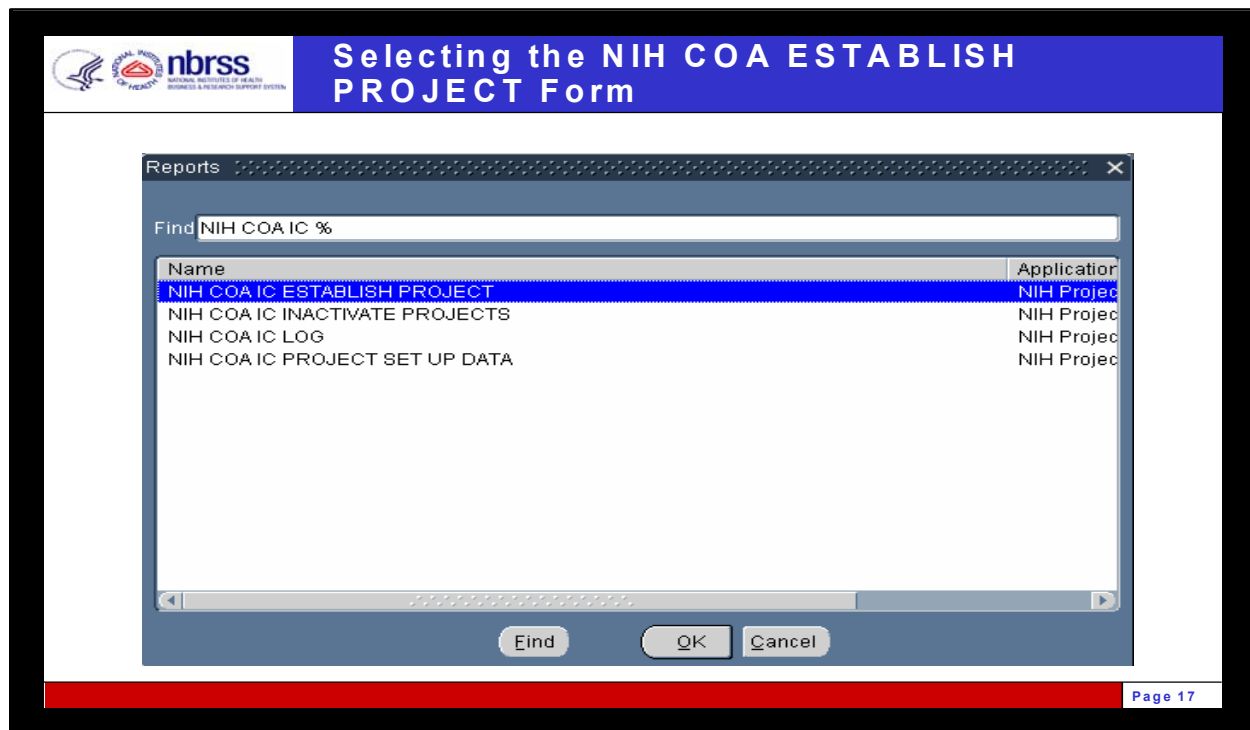
- You will need to organize the following information before you can enter a request for a new Project:
 - The Project Description – the name of the new Project
 - The Project Owning Org – The organization within the IC for which spending is tracked*
 - The Project Manager – the Budget Officer
 - The Project Duration Start Date – when will the Project begin incurring obligations
 - The ACS values related to the Project**
 - The MAS Cost Center

*The Project Owning Org MUST have a valid Standard Administrative Code (SAC) or it will not be available for selection

**ACS values for your IC are located in your IC's Budget Entry ADI spreadsheet

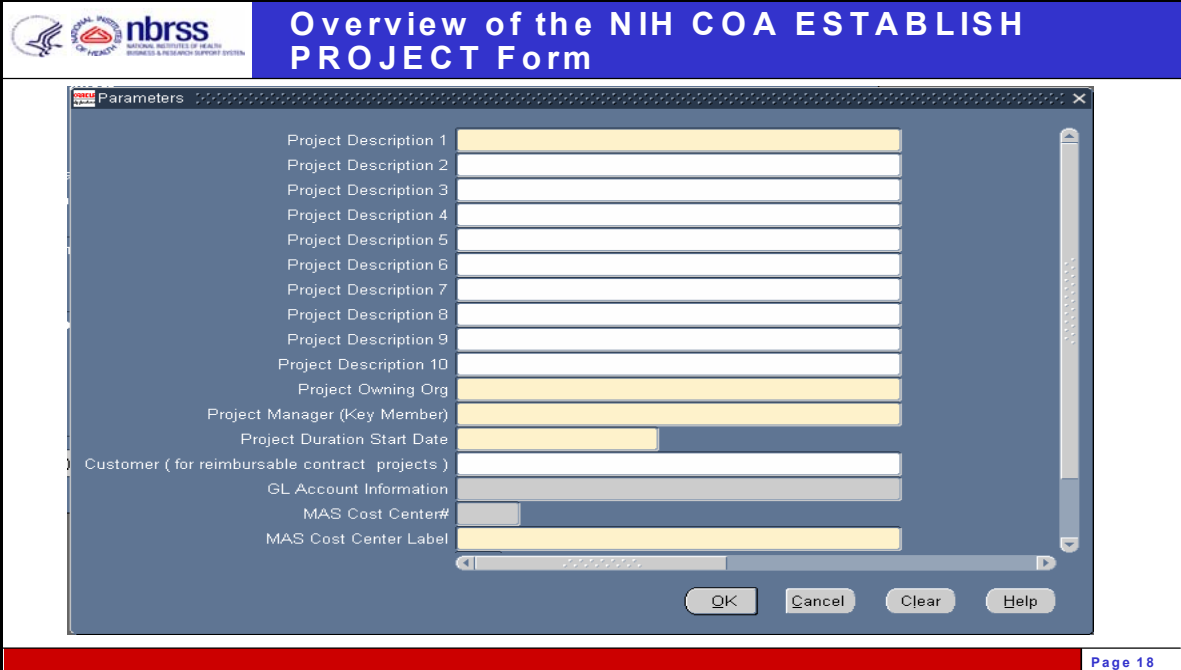
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Selecting the NIH COA ESTABLISH PROJECT Form



- There are four types of requests that you can use in Oracle Projects:
 - NIH COA ESTABLISH PROJECT – Used to create new Project requests
 - NIH COA IC INACTIVATE PROJECTS – Used to create deactivation requests
 - NIH COA IC LOG – Used to access a log that tracks the status of a request
 - NIH COA IC PROJECT SET UP DATA – Used to submit or delete pending requests
- To establish a new Project, you will select the first value – NIH COA ESTABLISH PROJECT.

Overview of the NIH COA ESTABLISH PROJECT Form



The screenshot displays a software window titled "Parameters" with a blue header bar. The header bar contains the NBRSS logo on the left and the text "Overview of the NIH COA ESTABLISH PROJECT Form" in white. The main area of the window is a list of input fields. Fields with yellow backgrounds are required: Project Description 1, Project Description 2, Project Description 3, Project Description 4, Project Description 5, Project Description 6, Project Description 7, Project Description 8, Project Description 9, Project Description 10, Project Owning Org, Project Manager (Key Member), Project Duration Start Date, Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, and MAS Cost Center Label. Fields with white backgrounds are optional: Project Description 11, Project Description 12, Project Description 13, Project Description 14, Project Description 15, Project Description 16, Project Description 17, Project Description 18, Project Description 19, Project Description 20, Project Description 21, Project Description 22, Project Description 23, Project Description 24, Project Description 25, Project Description 26, Project Description 27, Project Description 28, Project Description 29, Project Description 30, Project Description 31, Project Description 32, Project Description 33, Project Description 34, Project Description 35, Project Description 36, Project Description 37, Project Description 38, Project Description 39, Project Description 40, Project Description 41, Project Description 42, Project Description 43, Project Description 44, Project Description 45, Project Description 46, Project Description 47, Project Description 48, Project Description 49, Project Description 50, Project Description 51, Project Description 52, Project Description 53, Project Description 54, Project Description 55, Project Description 56, Project Description 57, Project Description 58, Project Description 59, Project Description 60, Project Description 61, Project Description 62, Project Description 63, Project Description 64, Project Description 65, Project Description 66, Project Description 67, Project Description 68, Project Description 69, Project Description 70, Project Description 71, Project Description 72, Project Description 73, Project Description 74, Project Description 75, Project Description 76, Project Description 77, Project Description 78, Project Description 79, Project Description 80, Project Description 81, Project Description 82, Project Description 83, Project Description 84, Project Description 85, Project Description 86, Project Description 87, Project Description 88, Project Description 89, Project Description 90, Project Description 91, Project Description 92, Project Description 93, Project Description 94, Project Description 95, Project Description 96, Project Description 97, Project Description 98, Project Description 99, Project Description 100. At the bottom of the window are buttons for OK, Cancel, Clear, and Help. A red bar at the bottom right of the window contains the text "Page 18".

- When you select the NIH COA IC ESTABLISH PROJECT, the new project request form will appear.
- You will use this project request form to enter information relating to your new project(s). Remember, all fields with yellow backgrounds are required fields.

Entering Project Descriptions

The screenshot shows a software interface titled "Entering Project Descriptions". It features a "Parameters" window with several input fields. A red box highlights the first ten fields, labeled "Project Description 1" through "Project Description 10". Below these are fields for "Project Owning Org", "Project Manager (Key Member)", "Project Duration Start Date", "Customer (for reimbursable contract projects)", "GL Account Information", "MAS Cost Center#", and "MAS Cost Center Label". The interface includes "OK", "Cancel", "Clear", and "Help" buttons at the bottom. The page number "Page 19" is displayed in the bottom right corner.

- The first step you must take when you setup a new Project request is to enter an informative Project Description.
- The Project Description you enter will also serve as the CAN label in the ADB.
- Behind the scenes, Oracle will assign a six-digit Project Number and a seven-digit CAN to each Project you create. These numbers will be emailed to you when OFM sets up your new Project.
- You must enter at least one Project Description, but may include up to ten if the Operating Budget and other Project attributes are the same.

Assigning a Project Owning Org

The screenshot shows a software window titled 'Parameters' with a blue header bar. The header bar contains the NBRSS logo on the left and the title 'Assigning a Project Owning Org' in white text. The main area of the window is a list of parameters, each with a corresponding input field. The parameters are: Project Description 1 through 10, Project Owning Org (highlighted with a red box), Project Manager (Key Member), Project Duration Start Date, Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, and MAS Cost Center Label. At the bottom of the window are four buttons: OK, Cancel, Clear, and Help. A red bar at the bottom of the window contains the text 'Page 20'.

- The Project Owning Org refers to the organization within the IC that controls a specific Project's (CAN's) spending.
- The Project Owning Org will drive or can filter the information available in drop down menus in other NBS modules.
- The NBS Team recommends , but does not require, that this organization is at a lower level than the Operating Budget Org.
- The Project Owning Org must be a valid Standard Administrative Code (SAC) listed in the LOV for this field.*

*If the SAC value you want to assign is not in the LOV, please review your official structure and consult with your Organization Change Coordinator.

If a new SAC is needed, your IC will need to work with OMA to establish the new value. Once the SAC value has been approved and updated in the HRDB, it will flow through automatically to the NBS.

Selecting a Project Manager (Key Member)

Parameters

Project Description 1

Project Description 2

Project Description 3

Project Description 4

Project Description 5

Project Description 6

Project Description 7

Project Description 8

Project Description 9

Project Description 10

Project Owning Org

Project Manager (Key Member)

Project Duration Start Date

Customer (for reimbursable contract projects)

GL Account Information

MAS Cost Center#

MAS Cost Center Label

OK Cancel Clear Help

Page 21

- The Project Manager (Key Member) is usually the Budget Officer. You can select the appropriate name from the LOV.
- This value can be changed after Project approval.
- The Project Manager you assign will receive email notifications for each new Project that is set up in the NBS.

Assigning a Project Duration Start Date

Parameters

Project Description 1

Project Description 2

Project Description 3

Project Description 4

Project Description 5

Project Description 6

Project Description 7

Project Description 8

Project Description 9

Project Description 10

Project Owning Org

Project Manager (Key Member)

Project Duration Start Date

Customer (for reimbursable contract projects)

GL Account Information

MAS Cost Center#

MAS Cost Center Label

OK Cancel Clear Help

Page 22

- The format for the Project Duration Start Date must be DD-MMM-YYYY.
- This is the date the Project can begin incurring expenses.
- The value in this field can be future-dated.

Adding a Customer

The screenshot shows a software window titled "Adding a Customer" with a blue header. Below the header is a "Parameters" dialog box. The dialog box contains a list of fields for project information. The field "Customer (for reimbursable contract projects)" is highlighted with a red rectangle. The fields are as follows:

- Project Description 1
- Project Description 2
- Project Description 3
- Project Description 4
- Project Description 5
- Project Description 6
- Project Description 7
- Project Description 8
- Project Description 9
- Project Description 10
- Project Owning Org
- Project Manager (Key Member)
- Project Duration Start Date
- Customer (for reimbursable contract projects)
- GL Account Information
- MAS Cost Center#
- MAS Cost Center Label

At the bottom of the dialog box are buttons for "OK", "Cancel", "Clear", and "Help". A red bar at the bottom of the window contains the text "Page 23".

- Projects can be Direct or Reimbursable, just like CANs.
- The Customer field is completed only if the project you are requesting is reimbursable.
- If your Project is reimbursable, select the only value that is valid for this field, "Conversion Customer".
- When additional Projects functionality becomes available in future deployments, you may be able to assign specific customers to a Project.

Associating ACS Values with Your Project

The screenshot shows a software window titled 'Parameters' with a blue header bar. The header bar contains the NBRSS logo on the left and the title 'Associating ACS Values with Your Project' in white text. The main area of the window is a list of project parameters, each with a corresponding text input field. The parameters are: Project Description 1 through 10, Project Owning Org, Project Manager (Key Member), Project Duration Start Date, Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, and MAS Cost Center Label. The 'GL Account Information' field is highlighted with a red rectangular border. At the bottom of the window, there are four buttons: OK, Cancel, Clear, and Help. A red bar at the bottom of the screenshot contains the text 'Page 24' on the right side.

- The GL Account Information field enables you to associate ACS values with your Project.
- When you click inside this field, it launches the Accounting Flexfield window, which displays your ACS fields.

Entering ACS Segment Values

The screenshot shows a window titled "Entering ACS Segment Values" with the NBRSS logo. Inside, there's a section titled "Accounting Flexfield" with a list of segments and their corresponding input fields. The segments and their values are:

Segment	Value	Default
FUND		
BFY		
FUND LIMIT		
ALLOT ORG		
ORG		
IE		
B ACT		
MECH		
LINE ITEM		
OBJECT CLASS		
SGL		
COHORT	9999	DEFAULT
HHS F1	9999	DEFAULT
NIH F1	9999	DEFAULT

At the bottom of the window, there are buttons for "OK", "Cancel", "Combinations", "Clear", and "Help".

- You will need to enter the ACS segment values associated with your project so OFM will know which segment values to assign to your new project.
- You can type the segment values directly into each field, or you can use the LOV to select values for each field. It is recommended that you use the LOV to increase accuracy.
- The values you enter/select must be valid segment values defined in the NBS. The system will not allow you to proceed if you enter a value that does not exist for a particular segment.
- If you do not have a specific value for the Line Item segment in your ADI sheet, select the default value, which will be a series of "9s".
- You will not enter values for the grayed out fields.

Entering Cost Centers

The screenshot shows a web-based form titled "Entering Cost Centers" with the NBRSS logo in the top left. The form is titled "Parameters" and contains the following fields:

- Project Description 1 through Project Description 10 (text input fields)
- Project Owning Org (text input field)
- Project Manager (Key Member) (text input field)
- Project Duration Start Date (date input field)
- Customer (for reimbursable contract projects) (text input field)
- GL Account Information (text input field)
- MAS Cost Center# (text input field, highlighted with a red rectangle)
- MAS Cost Center Label (text input field, highlighted with a red rectangle)

At the bottom of the form are buttons for "OK", "Cancel", "Clear", and "Help". A red bar at the bottom right of the page indicates "Page 26".

- If you are adding the new Project to an existing Cost Center, simply enter the number of the Cost Center in the MAS Cost Center # field. The Cost Center label will automatically populate.
- If you want to establish a new Cost Center, you cannot enter a new value directly into the MAS Cost Center # field. You must type the desired Cost Center label into the MAS Cost Center Label field. Any new Cost Centers you establish will appear in the Table 19 Report.
- If you want a specific Cost Center Number for your new Cost Center, enter the desired number into the Comments field.
- You cannot update an existing Cost Center Label using this form. You will need to work with OFM staff if you want to change a Cost Center Label.
- You cannot move Projects (CANs) from one Cost Center to another, you will have to continue the legacy practice of inactivating the existing Projects and creating new ones using the new Cost Center value.

Completing the Process Immediately Field

The screenshot shows a software window titled "Parameters" with a list of fields for project configuration. The fields include Project Description 4 through 10, Project Owning Org, Project Manager (Key Member), Project Duration Start Date, Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, MAS Cost Center Label, Process Immediately, Comments, and Project Duration Close Date. The "Process Immediately" field is highlighted with a red box and contains the value "Y". The "Yes" radio button is selected. The window also includes "OK", "Cancel", "Clear", and "Help" buttons at the bottom right. The NBRSS logo is visible in the top left corner of the window.

- You will also need to fill in the Process Immediately field.
- If you enter “Y” for Yes, the system will automatically forward your request to OFM.
- If you enter “N” for No, your request will go into a “pending” status and will require a separate step to submit the request to OFM. You may want to use this option when you are undertaking a major reorganization.

Entering a Project Duration Close Date

The screenshot displays the 'Parameters' window of the NBS Project Requests system. The window has a blue header bar with the NBRSS logo and the title 'Entering a Project Duration Close Date'. Below the header, there is a list of parameters for configuration. The 'Project Duration Close Date' field is highlighted with a red rectangular box. The other fields include Project Description 4 through 10, Project Owning Org, Project Manager (Key Member), Project Duration Start Date, Customer (for reimbursable contract projects), GL Account Information, MAS Cost Center#, MAS Cost Center Label, Process Immediately (with a 'Y' in the checkbox), and Comments. At the bottom of the window, there are buttons for 'OK', 'Cancel', 'Clear', and 'Help'. A red bar at the bottom of the window contains the text 'Page 28'.

- Certain Project accounts, such as Royalties, have specific end dates. The duration of these accounts can be identified at setup by completing the Project Duration Close Date field.
- **For most Project requests, this field should be left blank.**

Submitting Your Request

Submitting Your Request

Run this Request...

Name: NIH COA IC ESTABLISH PROJECT

Parameters: New Project 1:.....HNN102 NIA OD OEA OFC EXTRAML AFFRS:Rovine, Valerie:10

Copy...

Refresh Data Find Requests Submit a New Request... Languages...

Request ID	Name	Parent	Phase	Status	Parameters
99279	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1, , , , , , 1519, 22
99278	NIH COA IC ESTABLISH F		Completed	Normal	1211, , , , , , 130, 176, 10-OCT-
99277	NIH COA IC ESTABLISH F		Completed	Normal	xxx, , , , , , 1519, 227, 10-OCT-
99276	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1, , , , , , 1519, 22
99268	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99267	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99185	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,
99183	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,
99170	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,
99168	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,

Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

Submit Cancel

Options... Schedule...

Page 29

- Once you have entered all the fields for your new Project, you can submit your request by clicking on the **Submit** button.
- If you selected process immediately, your request will go directly to OFM for setup when you click the Submit button.
- If you do not select process immediately, your request will be placed on pending status until further review and final submission.
- After you submit your Project request, the Requests screen will appear, displaying your request ID and the phase and status of your request.

Error Message for No Operating Budget

The screenshot displays the NBRSS (National Institutes of Health Research Support System) interface. At the top, a blue banner reads "Error Message for No Operating Budget". Below this, a "Requests" window shows a table of requests. The first row, Request ID 98819, is highlighted in red and has a status of "Error". The second row, Request ID 98796, is highlighted in yellow and has a status of "Warning".

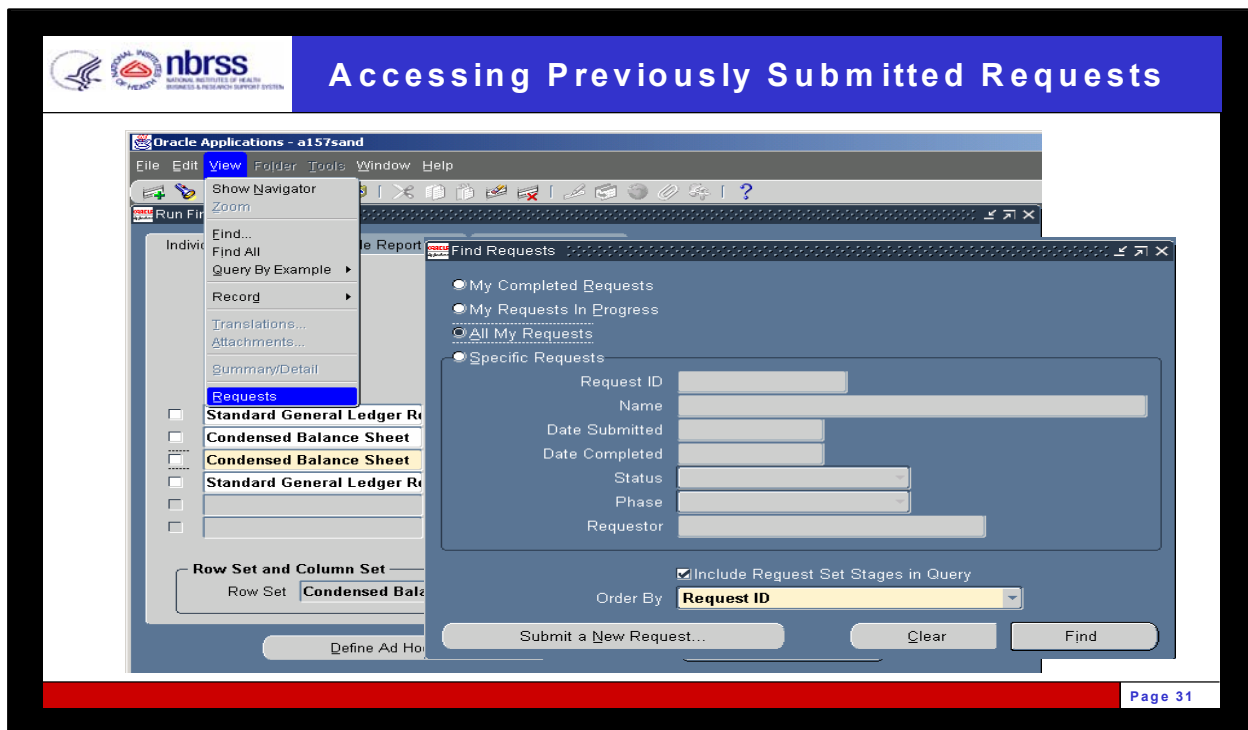
Request ID	Name	Parent	Phase	Status	Parameters
98819	NIH COA IC ESTABLISH		Completed	Error	OperBudgetTest3,, 1518
98796	NIH COA IC ESTABLISH		Completed	Warning	OperBudgTest,, 1518, 1

Below the table, a log file for request ID 98819 is displayed. The log contains project details and an error message: "An Operating Budget Account does not exist for the Project request you entered. Please submit an email request for a new Operating Budget Account to the NBRSS Finance mailbox located in the Microsoft Outlook Global Address List." At the bottom of the log, there are instructions to request a new Operating Budget Account and a reference to the ADI sheet.

Page 30

- If you enter a request for a Project that does not have an Operating Budget Account established, you will receive an error message when you submit your request. This message is displayed in red, with a status of "Error", as shown.
- If you receive this error message, click on the **View Log** button, and follow the instructions listed at the bottom of the report to request a new Operating Budget Account. Consult your ADI sheet for a list of valid Operating Budget Accounts.

Accessing Previously Submitted Requests



- To view previously submitted requests, click on the **View** pull down menu and select **Requests**.
- When the Find Request window appears, leave the default values, and click on the **Find** button.

Reviewing Submitted Requests

Reviewing Submitted Requests

Request ID	Name	Parent	Phase	Status	Parameters
111478	Financial Statement Gen		Pending	Normal	MAY_03_FY-03, , 1002, 1004, 1011,
111477	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1002, 1004, 1011,
111476	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1040, 1001, 692, U
111451	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1003, 1001, 1011,
111450	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1007, 1002, 1012,
111449	Financial Statement Gen		Completed	Terminated	MAY_03_FY-03, , 1006, 1007, 1017,
111401	Financial Statement Gen		Completed	Normal	MAY_03_FY-03, , 1006, 1007, 1017,
111310	PRC: Transaction Import		Completed	Terminated	VALTRAN,
111309	NIHPA Reset Interface Re		Completed	Normal	
111308	PRC: Transaction Import		Completed	Error	

Buttons: Refresh Data, Find Requests, Submit a New Request..., Hold Request, View Details..., View Output, Cancel Request, Diagnostics, View Log...

Page 32

- The last request you submitted will appear at the top of the request list. A request is selected when the first field of the request is hi-lighted in blue.
- Click on the **View Log** button to open your request.

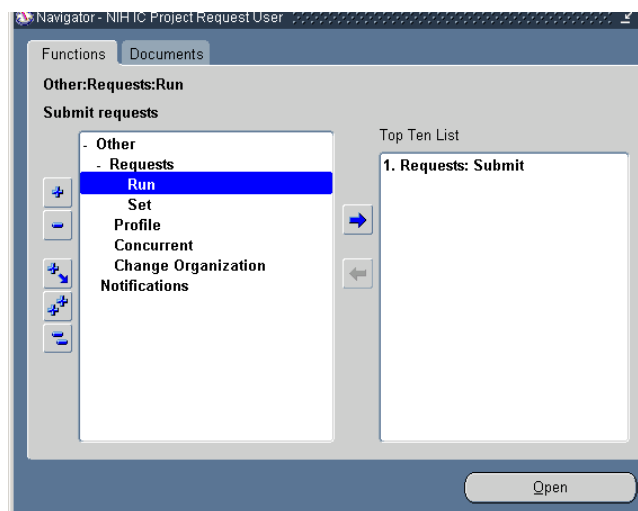
Establishing New Projects

NIH IC Project Request User

N>Other>Requests>Run

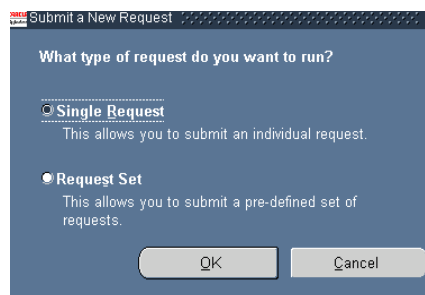
Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

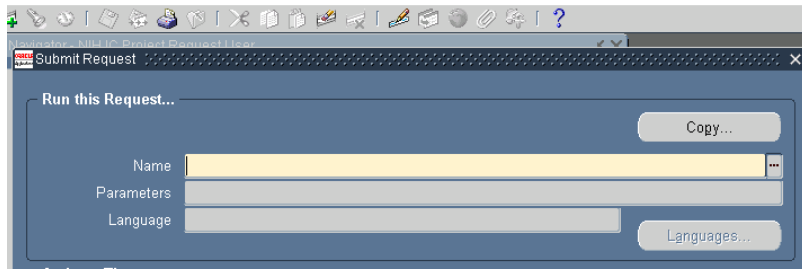


Result: The **Submit a New Request** pop-up window is displayed.

4. Select **Single Request** and click on the **OK** button.

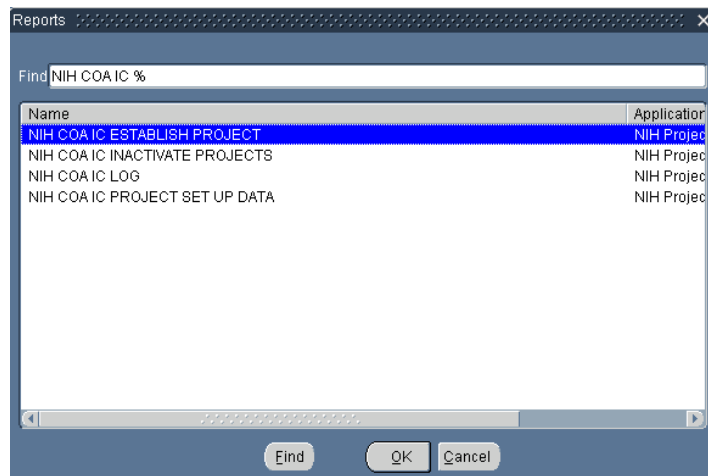


Result: The **Submit Request** window will appear.



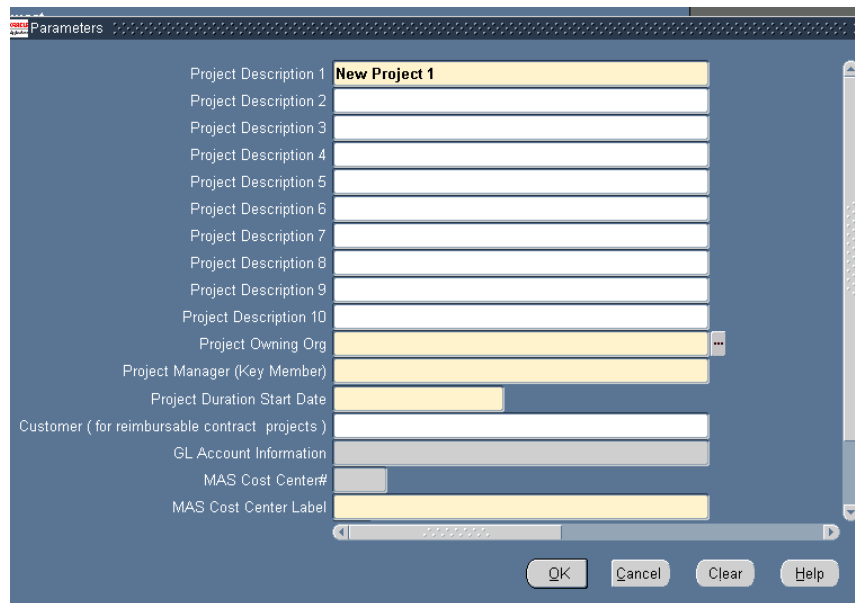
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The List of Values will appear.



6. From the LOV, select the **NIH COA IC ESTABLISH PROJECT** value and click the **OK** button.

Result: The NIH COA IC ESTABLISH PROJECT **Parameters** window will appear.



7. Enter a description for your new project in the Project Description 1 field. You may enter up to nine additional new projects if they are all associated with the same Operating Budget.
8. Click inside the Project Owning Org field, and then click the LOV next to this field.

Result: The LOV for Project Owning Org will appear.

9. Click inside the Find field and type all or part of the SAC related to the org you are assigning, followed by a % as shown, and then click the Find button

Result: All values beginning with HNN1 will appear in the LOV.

10. Select the SAC you want to use for the Project Owning Org and click on the OK button

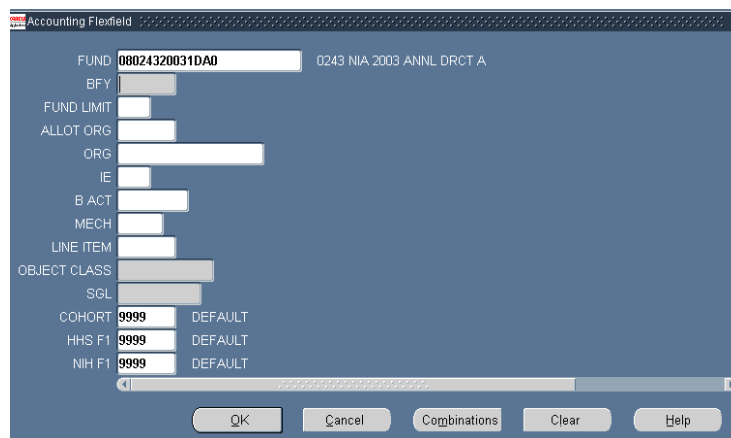
Result: This value will appear in the Project Owning Org field.

11. Complete the following additional fields on the form by using the LOV or typing the values into the fields:

Field	Description
Project Manager	Person who is fiscally responsible for the Project, most likely the Budget Officer. The Project Manager will receive an email notification when the project is complete
Project Duration Start Date	The date the project should be available for obligations
Customer	Direct Projects do not have customers. Reimbursable Projects will in the future. For now, enter "Conversion Customer" for all Reimbursable Projects only.

12. Click inside the **GL Account Information** field

Result: The Accounting Flexfield window will appear, displaying all of the ACS value fields.



The screenshot shows the 'Accounting Flexfield' window with the following fields and values:

Field	Value
FUND	000243200310A0
BFY	
FUND LIMIT	
ALLOT ORG	
ORG	
IE	
B ACT	
MECH	
LINE ITEM	
OBJECT CLASS	
SGL	
COHORT	9999
HHS F1	9999
NIH F1	9999

At the bottom of the window, there are buttons for OK, Cancel, Combinations, Clear, and Help.

13. Complete the following ACS fields:

Field	Description
Fund	14 character code that identifies the OpDiv (NIH), the IMN, the Appropriation Fiscal Year, whether the fund is Direct or Reimbursable and Category A or Category B
Fund Limit	Defines whether the Allotment relates to any special law or program (Small Business, Superfund, etc.)
Allotment Org	Identifies the IC to whom an Allotment is issued
Org	Represents the organizational unit within the IC to whom the Operating Budget is issued
IE	Indicates whether the use of funds is internal by NIH or external by the research community
Budget Activity	Identifies an area of research to which the funds are applied
Mechanism	Identifies the research mechanism to which the funds are applied
Line Item	Catch all segment that uniquely identifies the Operating Budget if all other segment values are the same
Cohort	Not currently used - leave the default of 9999
HHSF1	Not currently used - leave the default of 9999
NIHF1	Not currently used - leave the default of 9999

14. Click the **OK** button when you are finished entering the segment values.

Result: You will return to the NIH COA IC ESTABLISH PROJECT FORM.

15. Enter the MAS Cost Center for the new Project.

16. Leave the default value of "Y" in the Process Immediately field if you want your request to go directly to OFM for process. If you do not want your request to be processed immediately, change the value to "N" for No.

17. Enter any comments for OFM into the Comments field.

18. Leave the Project Duration Close Date field blank

19. Click on the OK button to close the NIH COA IC ESTABLISH PROJECT FORM.

Result: You will return to the Submit Request window.

Submit Request

Run this Request...

Name: NIH COA IC ESTABLISH PROJECT

Parameters: New Project 1: HNN102 NIA OD OEA OFC EXTRAML AFFRS:Rovine, Valerie:10

Language: American English

Copy...

At these Times...

Run the Job: As Soon as Possible

Schedule...

Upon Completion...

☒ Save all Output Files

Notify:

Print to: noprint

Options...

Help (B) Submit Cancel

20. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

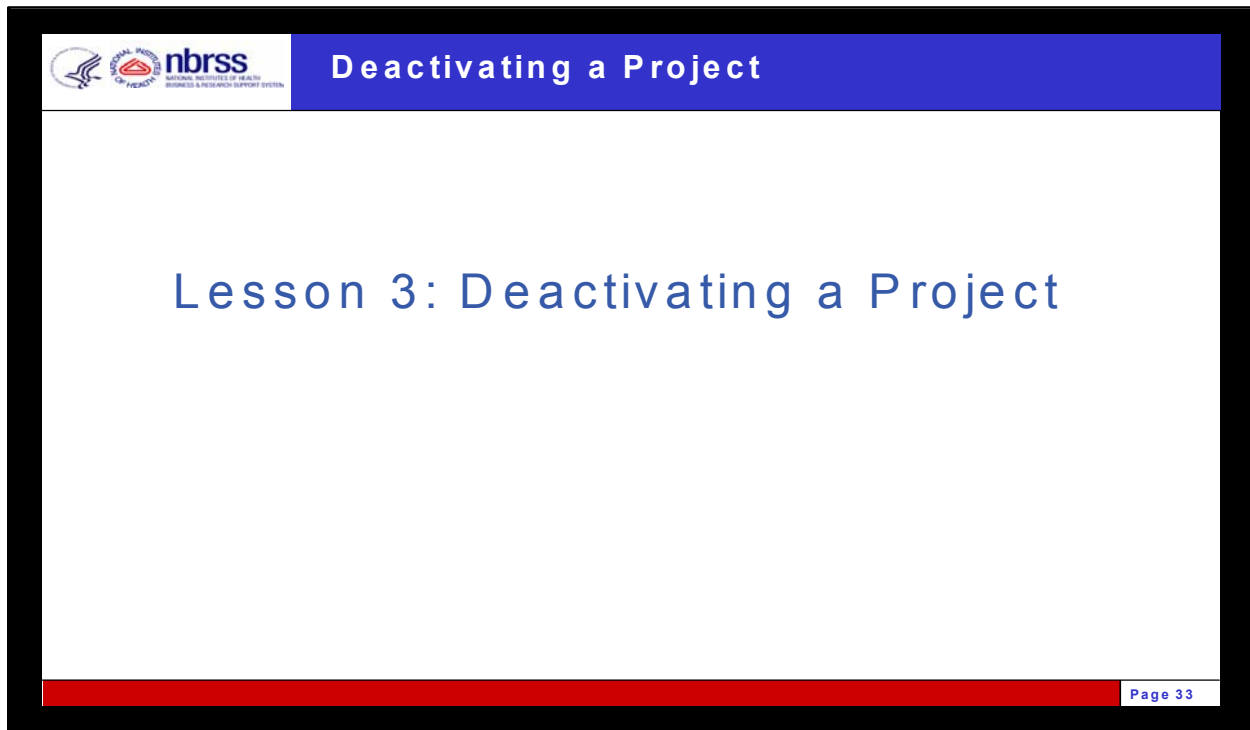
Requests					
Refresh Data		Find Requests		Submit a New Request...	
Request ID	Name	Parent	Phase	Status	Parameters
111056	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1,, 1519, 15
111047	NIH COA IC LOG		Completed	Normal	1571, P, IC LOG, ,
111046	NIH COA IC INACTIVATE		Completed	Normal	15189, 07-MAY-2003,,
111045	NIH COA IC INACTIVATE		Completed	Normal	18993, 07-MAY-2003,,
111044	NIH COA IC INACTIVATE		Completed	Normal	15189, 07-MAY-2003,,
110116	NIH COA IC ESTABLISH F		Completed	Error	Amy's Happy Project,, 1

- Click on the **Refresh Data** button until the Phase value for the request changes to completed.

Result: Your project will be submitted to OFM if you answered "Yes" to Process Immediately. You and the Project Manager will receive an email notification or a notification through Oracle once your new project is established by OFM. If you answered "No" to Process Immediately, you will need to submit your request as a separate step.

End of activity

Deactivating a Project



The image is a screenshot of a presentation slide. At the top left, there is a logo for 'nbrss' (National Institutes of Health Biomedical Research Support System) with the text 'NATIONAL INSTITUTES OF HEALTH' and 'BIOMEDICAL RESEARCH SUPPORT SYSTEM' below it. To the right of the logo, the title 'Deactivating a Project' is displayed in white text on a blue background. The main body of the slide is white and contains the text 'Lesson 3: Deactivating a Project' in blue. At the bottom right, there is a red bar with the text 'Page 33' in white.

Selecting the NIH COA IC INACTIVATE PROJECTS Form

The screenshot shows a software interface titled "Selecting the NIH COA IC INACTIVATE PROJECTS Form". At the top left, there are logos for the National Institutes of Health (NIH) and the National Business Research Support System (NBRSS). The main window is titled "Reports" and contains a search bar with the text "Find NIH COA IC %". Below the search bar is a table with two columns: "Name" and "Application". The table lists four items: "NIH COA IC ESTABLISH PROJECT", "NIH COA IC INACTIVATE PROJECTS" (which is highlighted in blue), "NIH COA IC LOG", and "NIH COA IC PROJECT SET UP DATA". At the bottom of the window are three buttons: "Find", "OK", and "Cancel". A red bar at the bottom right of the window contains the text "Page 34".

Name	Application
NIH COA IC ESTABLISH PROJECT	NIH Project
NIH COA IC INACTIVATE PROJECTS	NIH Project
NIH COA IC LOG	NIH Project
NIH COA IC PROJECT SET UP DATA	NIH Project

- You also have the capability within the NBS to inactivate projects (CANs) you are no longer using. A separate form has been created for inactivating projects.
- You will use the Submit Request window to pull up the form used to enter your project inactivation request. This form is called the NIH COA IC INACTIVATE PROJECTS form.

Overview of the Project Inactivation Form

The screenshot shows a software window titled "Parameters" with a blue header bar containing the text "Overview of the Project Inactivation Form". The window contains a list of input fields for project deactivation. The fields are organized into rows, each with a label and a text input area. The first row has a yellow background for the "Oracle Proj #" field. The second row has a white background for the "Deactivation date" field. The third row has a white background for the "Comments" field. This pattern of alternating yellow and white backgrounds continues for several rows. At the bottom of the form, there is a "Process Immed" field with a dropdown menu set to "Y" and the text "Yes" next to it. Below the form fields are four buttons: "OK", "Cancel", "Clear", and "Help". In the bottom right corner of the window, there is a label "Page 35".

- When you select the NIH COA IC INACTIVATE PROJECTS value, the deactivation request form will appear.
- You will use this deactivation request form to identify the Projects you want to deactivate. Remember, all fields with yellow backgrounds are required fields.
- You can forward any comments or special instructions to OFM in the Comments field.
- The Process Immediately field indicates whether OFM should process the deactivation immediately or if the requestor wants to submit the request at a later date. The default value is "Y" ("Yes") for immediate processing.

Selecting the Project for Inactivation

Parameters

Oracle Proj #
Deactivation date
Comments

Oracle Proj #

Oracle Proj #	Description
100001	8331753
100002	8331751
100003	8421781
100004	8335594
100005	8425556
100006	8420175
100007	8420257
100008	8429383
100009	8429384
100010	8420177
100011	8420256
100012	8420258
100013	8420179
100014	8426608
100015	8426610
100016	8320201
100017	8320220

Find 1%

Find OK Cancel

- You must enter at least one Oracle Project #, but may deactivate up to five projects at the same time.
- Use the LOV to locate the Project you want to deactivate.
- You can search on either the Project # or the corresponding CAN. If you would prefer to search on the CAN you will need to use the % sign as a wild card at the beginning of the value.

Entering the Deactivation Date

The screenshot shows a software window titled "Entering the Deactivation Date" with the NBRSS logo. It contains a list of parameters for a project. The "Deactivation date" field is highlighted with a red rectangle. The "Process Immed" checkbox is checked, and the "Yes" button is visible. The window includes OK, Cancel, Clear, and Help buttons at the bottom right.

- The Deactivation Date is the last day the Project will be able to incur obligations.
- If you want the deactivation to be immediate, use the current date as the Deactivation Date.
- The Deactivation Date can also be used to identify a future point in time when you want the deactivation to go into effect, such as the end of the fiscal year. In this case, you would enter 30-SEP-2003 as the Deactivation Date, and OFM would process the deactivation to be effective as of that date. This date prevents use in FY 2004.

Completing the Process Immediately Field

The screenshot shows a software window titled "Parameters" with a blue header bar. The header bar contains the NBRSS logo on the left and the text "Completing the Process Immediately Field" on the right. The main area of the window is a list of parameters, each with a label and a text input field. The parameters are: Oracle Proj #, Deactivation date, Comments, Oracle Proj #, Deactivation date, Comments, Oracle Proj #, Deactivation date, Comments, Oracle Proj #, Deactivation date, Comments, Oracle Proj #, Deactivation date, Comments, and Process Immed. The "Process Immed" field is highlighted with a red rectangular box. The value "Y" is entered in the "Process Immed" field, and the word "Yes" is displayed to its right. At the bottom of the window, there are four buttons: OK, Cancel, Clear, and Help. A red bar at the bottom of the window contains the text "Page 38" on the right side.

- You will also need to fill in the Process Immediately field.
- If you enter “Y” for Yes, the system will automatically forward your request to OFM.
- If you enter “N” for No, your request will go into a “pending” status and will require a separate step to submit the request to OFM.

Submitting Your Deactivation Request

Submitting Your Deactivation Request

Run this Request...

Name: NIH COA IC INACTIVATE PROJECTS

Parameters: 44365:12-NOV-2002:.....N

Language: American English

Copy...

Submit

Cancel

Options...

Schedule...

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
99545	NIH COA IC INACTIVATE		Completed	Normal	35482, 12-NOV-2002,
99279	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1,, 1519, 22
99278	NIH COA IC ESTABLISH F		Completed	Normal	1211,, 130, 176, 10-OCT-
99277	NIH COA IC ESTABLISH F		Completed	Normal	xxx,, 1519, 227, 10-OCT
99276	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1,, 1519, 22
99268	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99267	NIH COA IC LOG		Completed	Normal	1350, S, IC LOG, ,
99185	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,
99183	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,
99170	NIH COA OFM LOG		Completed	Normal	1350, S, OFM LOG, ,

Hold Request View Details... View Output

Cancel Request Diagnostics View Log...

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- Once you have entered all the fields for your deactivation request, you can submit your request by clicking on the **Submit** button.
- If you selected process immediately, your request will go directly to OFM for setup when you click the Submit button.
- If you choose not to process immediately, your request will be placed on a pending status until further review and final submission.
- After you submit your deactivation request, the Requests screen will appear, displaying your request ID and the phase and status of your request.

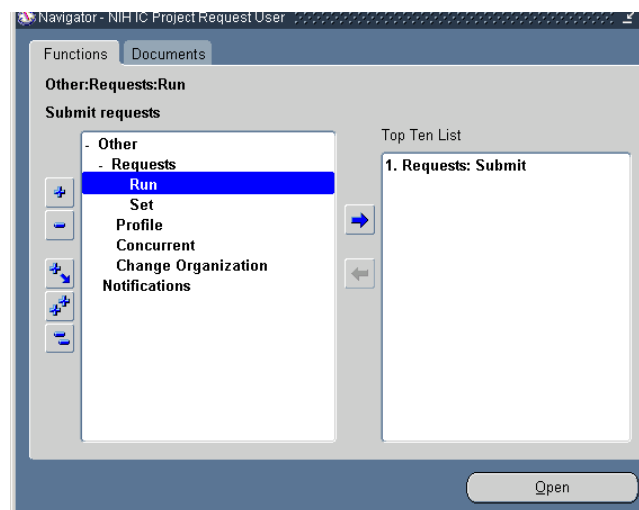
Deactivating Projects

NIH IC Project Request User

N>Other>Requests>Run

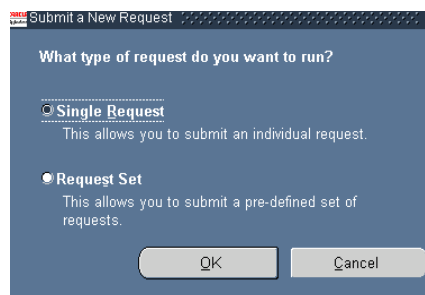
Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

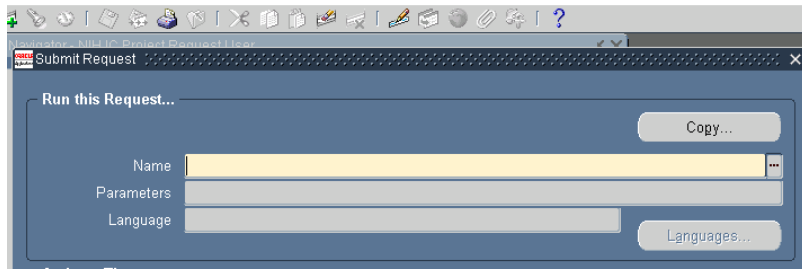


Result: The **Submit a New Request** pop-up window is displayed.

4. Select **Single Request** and click on the **OK** button.

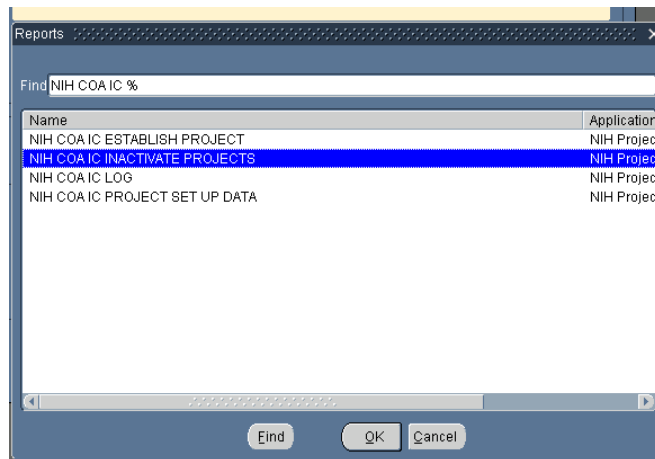


Result: The **Submit Request** window will appear.



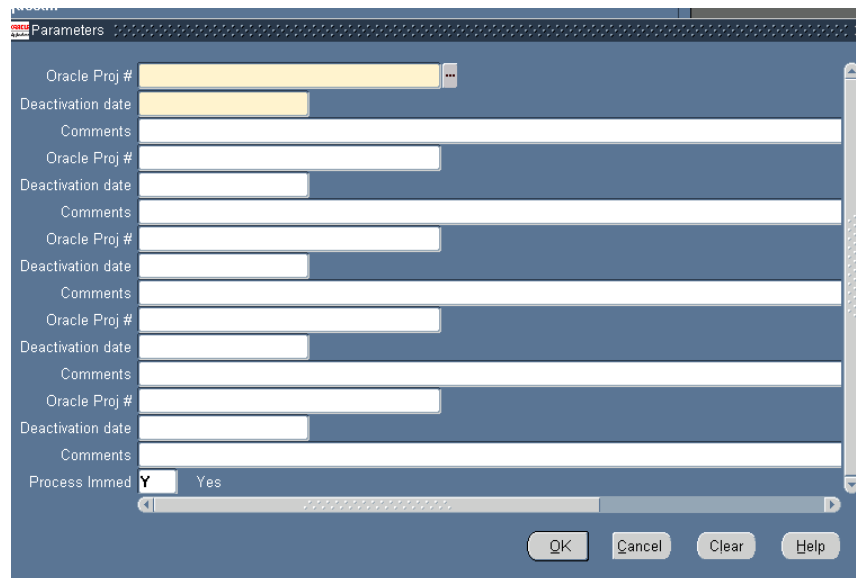
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The Reports LOV will appear.



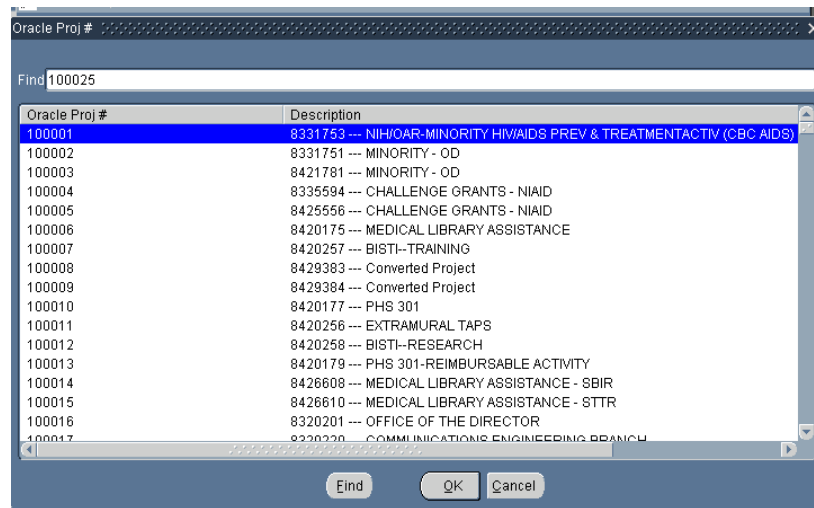
6. From the LOV, select the **NIH COA IC INACTIVATE PROJECTS** value and click the **OK** button

Result: The NIH COA IC INACTIVATE PROJECTS **Parameters** window will appear.



7. Click the LOV next to the Oracle Proj # field

Result: The List of Values displaying Oracle Project #s and Descriptions will appear.

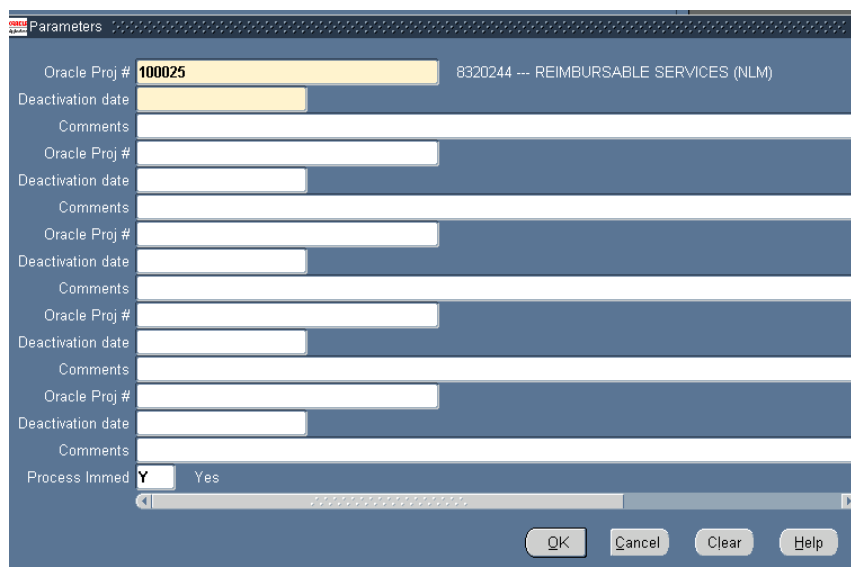


8. In the Project # LOV, you can search by Oracle Project Number, if you know it, or by CAN, which is part of the description.
9. To search by Project #, enter the Project Number into the Find field and then click on the Find button.

Result: The Project Number will appear in the Oracle Proj # field.

10. To search by CAN, enter a % into the Find field, followed by the 7-digit CAN, and then click on the Find button.

Result: The Project Number will appear in the Oracle Proj # field, and the related CAN and description will appear in the label.



11. Enter the Deactivation date, which is the date you want the project to stop accepting obligations.
 12. Leave the default value of "Y" in the Process Immediately field if you want your request to go directly to OFM for process. If you do not want your request to be processed immediately, change the value to "N" for No.
 13. Click on the **OK** button.
- Result: You will return to the Submit Request window.
14. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

Request ID	Name	Parent	Phase	Status	Parameters
111059	NIH COA IC INACTIVATE		Completed	Normal	18993, 07-MAY-2003,
111057	NIH COA IC INACTIVATE		Completed	Normal	15189, 07-MAY-2003,
111056	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1,, 1519, 15
111047	NIH COA IC LOG		Completed	Normal	1571, P, IC LOG, ,
111046	NIH COA IC INACTIVATE		Completed	Normal	15189, 07-MAY-2003,
111045	NIH COA IC INACTIVATE		Completed	Normal	18993, 07-MAY-2003,
111044	NIH COA IC INACTIVATE		Completed	Normal	15189, 07-MAY-2003,
110116	NIH COA IC ESTABLISH F		Completed	Error	AMy's Happy Project,, 1

15. Click on the **Refresh Data** button until the Phase value for the request changes to completed.

Result: Your deactivation request has been submitted to OFM because you answered Yes to Process Immediately.

End of activity

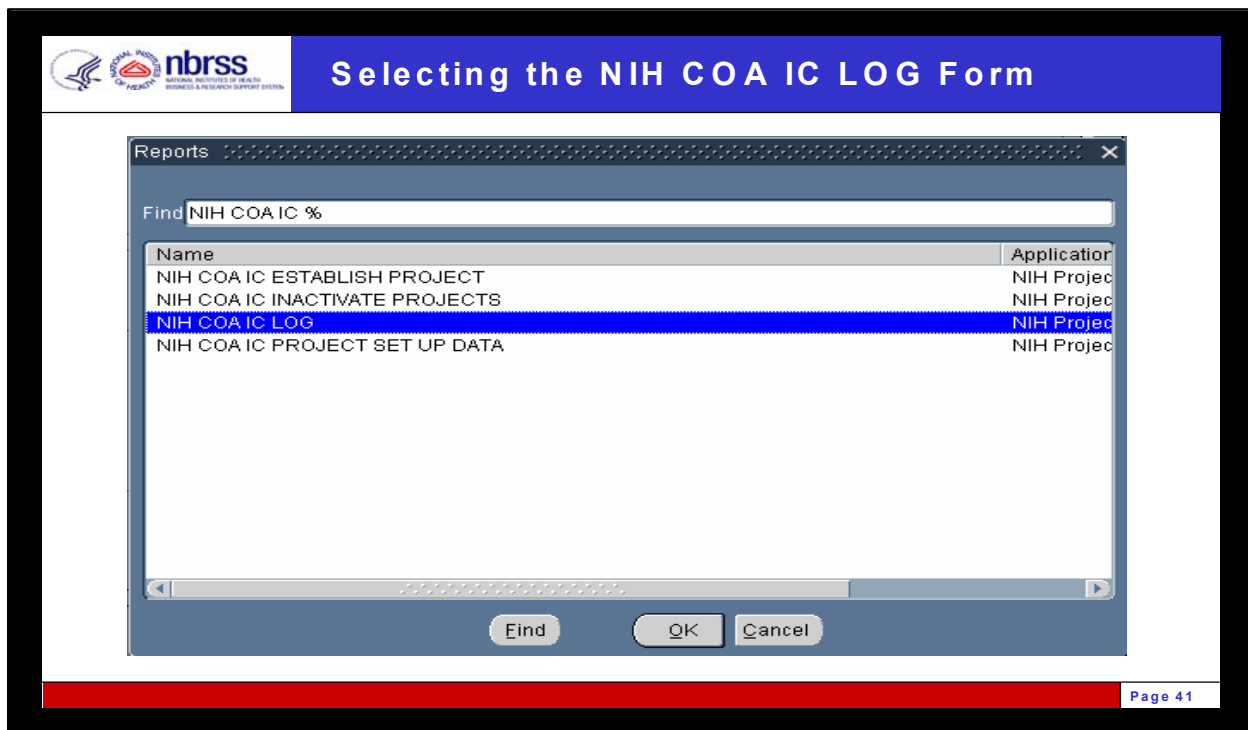
The slide features a blue header bar with the NBRSS logo on the left and the title "Working with the Project Request Log" in white text. The main content area is white with the title "Lesson 4: Working with the Project Request Log" in blue text. A red footer bar at the bottom right contains the text "Page 40".

Working with the Project Request Log

Lesson 4: Working with the Project Request Log

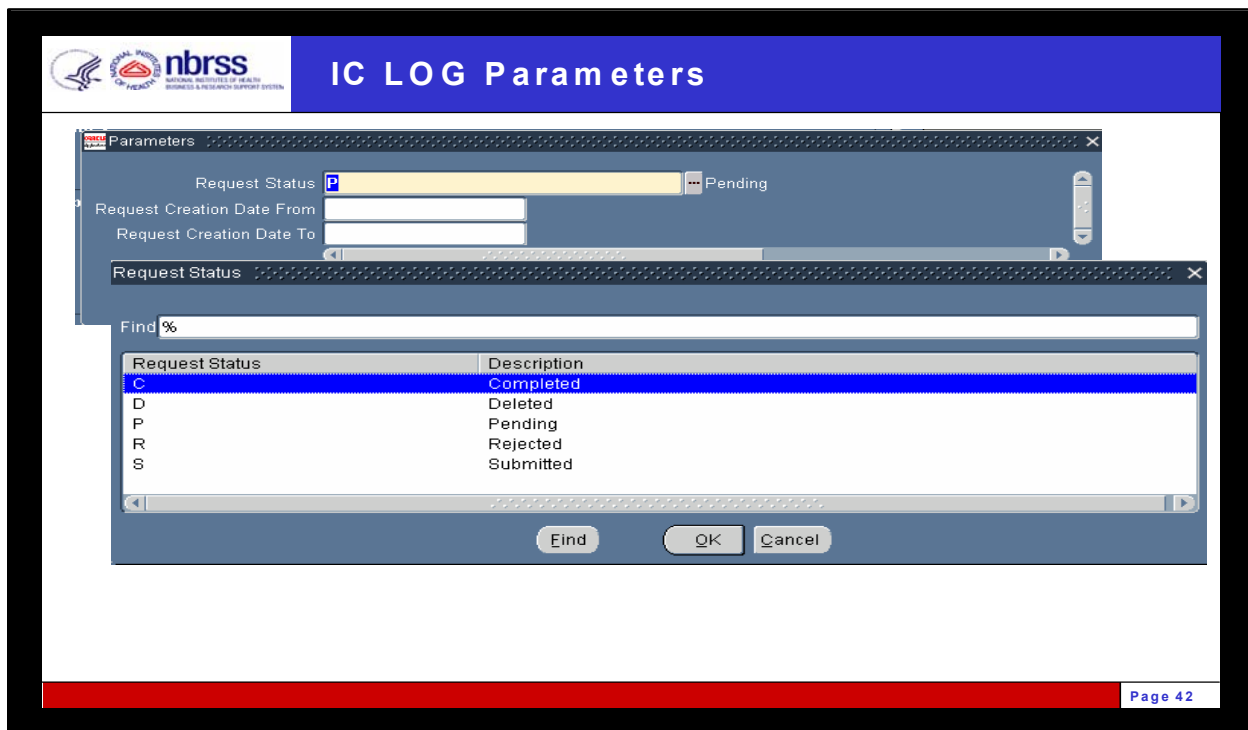
Page 40

Selecting the NIH COA IC LOG Form



- Selecting the NIH COA IC LOG option enables you to view the status of all requests you have created using Oracle Projects.
- While running the log is an **optional** step, it can be useful in helping you keep track of all of your project requests.

IC LOG Parameters



- The IC Log Parameters window provides information on request statuses, so you can see exactly where your project is in the request process. You can choose to query on the following statuses:
 - A **Completed** status means that OFM has entered the new Project, so the request is complete.
 - A **Deleted** status means the IC has deleted the request using the IC PROJECT SETUP DATA process.
 - A **Pending** status is assigned to all new project requests and inactivation requests that have not yet been submitted to OFM, and are therefore “pending” submission.
 - The **Rejected** status means that some piece of requested information has caused the project to reject. Corrective action by you is needed.
 - A **Submitted** status means that the project has been submitted to OFM, but OFM has not yet entered the request.

- You can also select a specific date range in which to search for requests.

Querying for Pending Requests

Submit Request

Run this Request...

Name: **NIH COA IC LOG** Copy...

Parameters: **P::**

Language: **American English** Languages...

At these Times...

Run the Job: **As Soon as Possible** Schedule...

Upon Completion...

☒ Save all Output Files

Notify: Options...

Print to: **noprnt**

Help (H) Submit Cancel

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- After you select the status of the requests you want to see in the log, you can submit your request to view the log by clicking on the **Submit** button.

Opening the Results of Your Request

Opening the Results of Your Request

Report requestID - 111016

Page 2 Font Size 10

05-MAY-03 02:46 PM NIH COA IC LOG - A157SAND Instance

Project Template: N Status: P
Request Id 109073 Operating Budget Exists N Request Status Pending
Project Description new
Project Organization HBN025 NIA IRP LCI LAB CLINICAL INVESTIGATION
Project Manager CUSHING, Mary C Proj.Start Date 10-MAR-03 Proj.End Date
PARTIAL ACS
Fund 08029120031DA0 0291 NHGRI 2003 ANNL DRCT A
BFY
Fund limit 12 DIABETES
Allot Org B100 NIAMS
GL Org HN27800000C HN278 NINR DIR HPL HEALTH PROMOTION LAB
IE I Internal
Budget Activity 00019 NCI RESOURCE-RESC MANPOWER DEVELOPMENT
Mechanism 051 CENTERS GENERAL
Line Item 0014 BUILDING 10 PHASE I RENOVATION
NBS LOGON CASE # 120 TRAINING NATIONAL RESC SERVICE UNITS

View Output
View Log...

Go To... First Previous Next Last

Page 44

- To view the log, click on the **View Output** button at the bottom of the Requests window.
- New Project requests will always appear at the top of the log and deactivation requests will appear at the bottom of the log.
- Use the **First**, **Previous**, **Next** and **Last** buttons to navigate through the report.
- Close the log by clicking on the **Close** box on the upper right side of the report window.

Accessing the NIH IC COA Log

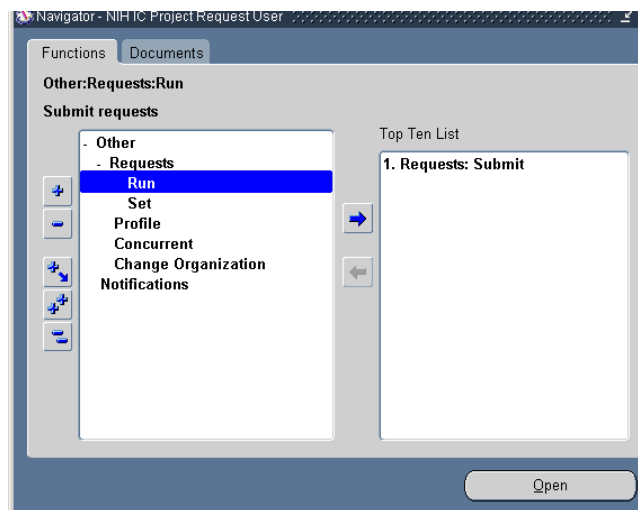
{Insert the appropriate system reference here.}

NIH IC Project Request User

N>Other>Requests>Run

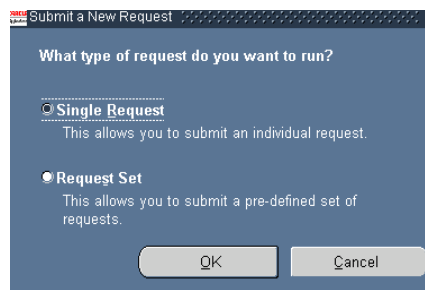
Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

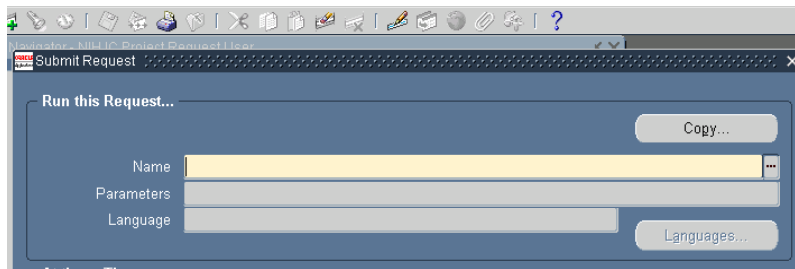


Result: The **Submit a New Request** pop-up window is displayed

4. Select **Single Request** and click on the **OK** button.

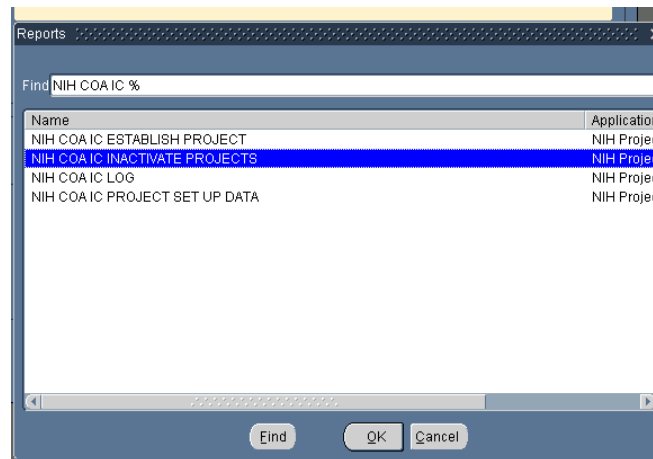


Result: The **Submit Request** window will appear.



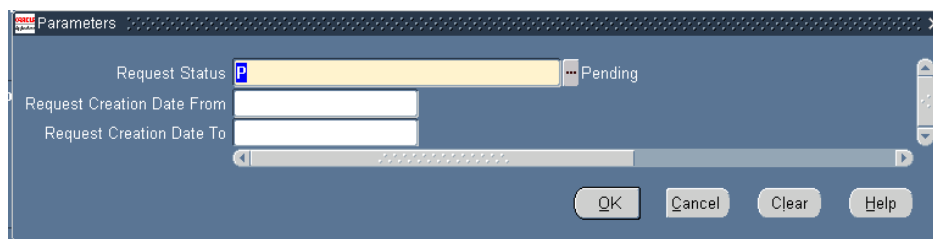
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The List of Values will appear.



6. From the LOV, select the **NIH COA IC Log** value and click the **OK** button.

Result: The NIH COA IC LOG **Parameters** window will appear.



7. Leave the default value of P for Pending in the Request Status field.
8. Enter the Request Creation Date From and the Request Creation Date To if desired, or leave blank.
9. Click on the **OK** button.

Result: You will return to the Submit Request window.

Submit Request

Run this Request...

Name NIH COA IC LOG

Parameters P::

Language American English

Copy...

At these Times...

Run the Job As Soon as Possible

Schedule...

Upon Completion...

☒ Save all Output Files

Notify

Print to noprint

Options...

Help (?) Submit Cancel

12. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

Requests

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
99552	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99551	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99550	NIH COA IC PROJECT SE		Completed	Normal	Submitted, Selected, 99548
99549	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99548	NIH COA IC INACTIVATE		Completed	Normal	35495, 24-NOV-2002, ,,,,,,,,,,
99547	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG,,
99546	NIH COA IC PROJECT SE		Completed	Normal	Submitted, All,
99545	NIH COA IC INACTIVATE		Completed	Normal	35482, 12-NOV-2002, ,,,,,,,,,,
99279	NIH COA IC ESTABLISH F		Completed	Normal	New Project 1, ,,,,,,,,,, 1519, 22
99278	NIH COA IC ESTABLISH F		Completed	Normal	1211, ,,,,,,,,,, 130, 176, 10-OCT-

Hold Request View Details... View Output

Cancel Request Diagnostics View Log..

- Click on the **Refresh Data** button until the Phase value for the request changes to completed.
- Click on the View Output button to view the request log.

Result: The log will be appear, displaying all of your pending requests.

Report request ID - 111047

Page **2** Font Size **10**

06-MAY-03 02:06 PM NIH COA IC LOG - A157SAND I

Project Template: N Status : P



Request Id	Status	Project Num	Project Name	Project End Date	Request Creation Date
111045	Pending	103829	8423154	07-MAY-03	06-MAY-2003

Go To... First Previous Next Last

- Click the **Last** button to move to the bottom of the report, where deactivation requests are displayed.

End of activity

Submitting or Deleting Pending Requests

**nbrss**
NATIONAL BUREAU OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

Submitting or Deleting Pending Requests

Lesson 5: Submitting or Deleting Pending Requests

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Selecting the NIH COA IC PROJECT SET UP DATA Form

Reports

Find NIH COA IC %

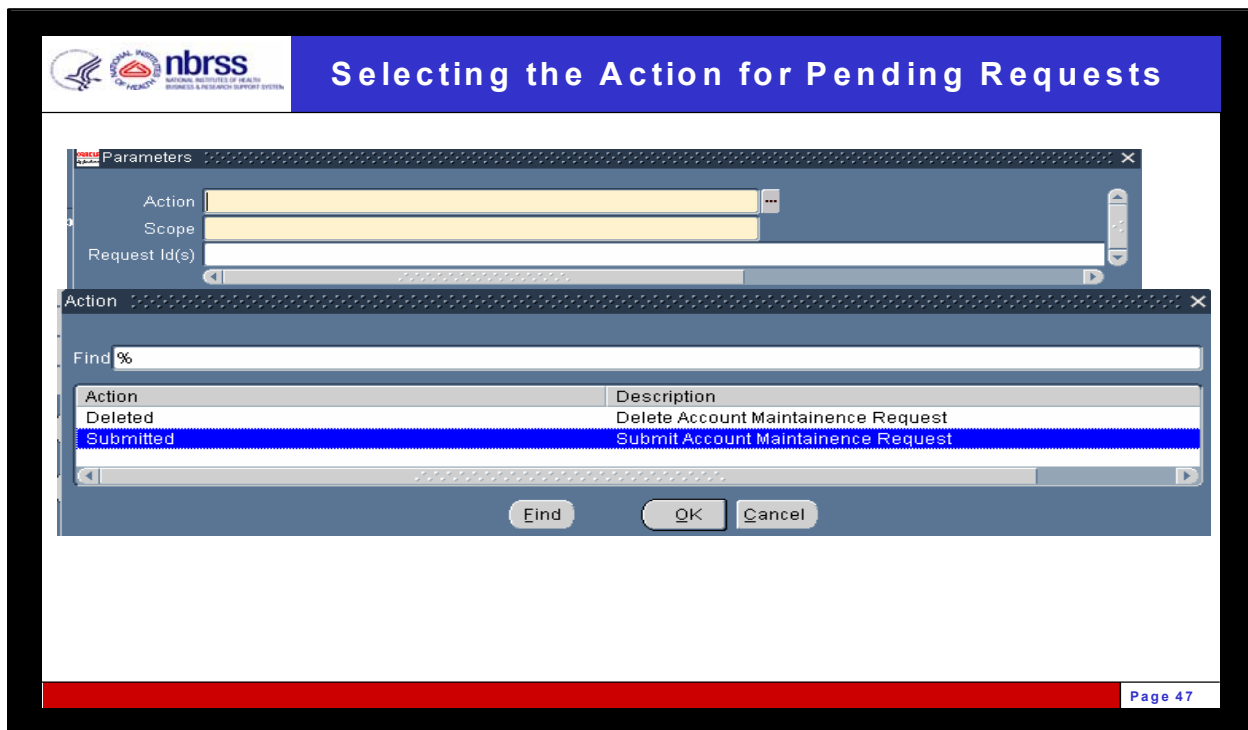
Name	Application
NIH COA IC ESTABLISH PROJECT	NIH Project
NIH COA IC INACTIVATE PROJECTS	NIH Project
NIH COA IC LOG	NIH Project
NIH COA IC PROJECT SET UP DATA	NIH Project

Find OK Cancel

Page 46

- If you have any pending new project or deactivation requests, you will use the NIH COA IC PROJECT SET UP DATA form to either submit or delete these requests. You will have pending requests if you overrode the “Process Immediately” option in the Project Request or Deactivation Request forms.

Selecting the Action for Pending Requests



- You will need to select the action you want to take with your pending requests. You have two choices of Actions to take:
- Select “Submitted” if you want to forward the request to OFM.
- Select “Deleted” if you want to delete the pending request.

Selecting the Scope of Requests to be Submitted

The screenshot shows a software interface for submitting account maintenance requests. The main window is titled 'Parameters' and has a button 'Submit Account Maintenance Request'. It contains two fields: 'Action' (set to 'Submitted') and 'Scope' (set to 'All'). A secondary 'Scope' dialog box is open, displaying a table with the following data:

Scope	Description
All	All requests
Selected	Enter request ids separated by ,

The 'All' row is highlighted. Below the table are 'Find', 'OK', and 'Cancel' buttons. The page number 'Page 48' is visible in the bottom right corner.

- You will also need to select the Scope of the requests you would like to submit.
- Select “All” to take action on all pending requests.
- Select “Selected” if you would only like to take action on certain pending requests. When the scope field is populated with “Selected” a request number must be designated.

[illegible]

- ## NBS Project Requests

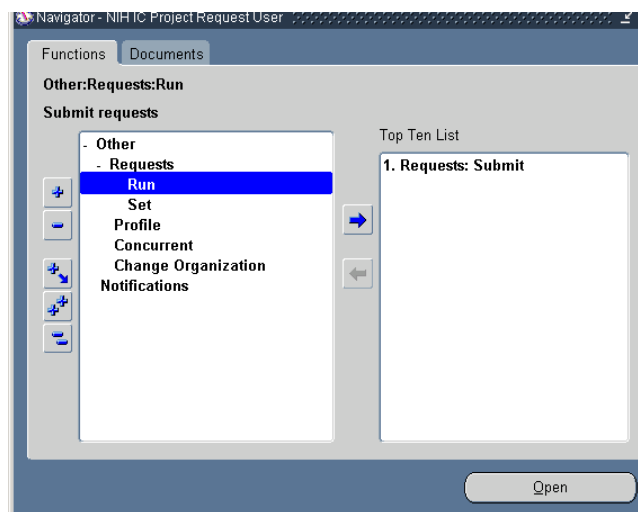
Accessing the NIH COA IC Project Setup Form

NIH IC Project Request User

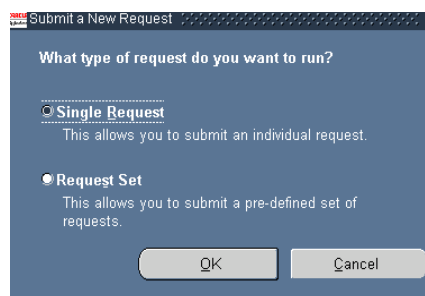
N>Other>Requests>Run

Submit a New Request

1. From the Oracle Navigator, double click on the **Other** function.
2. Double click on the **Requests** Function.
3. Double click on the **Run** function or highlight the **Run** function and click the **OK** button.

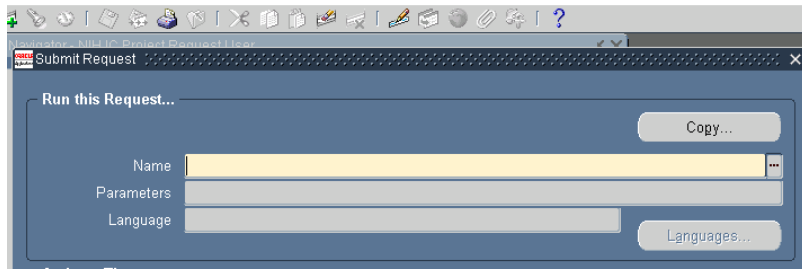


Result: The **Submit a New Request** pop-up window is displayed.



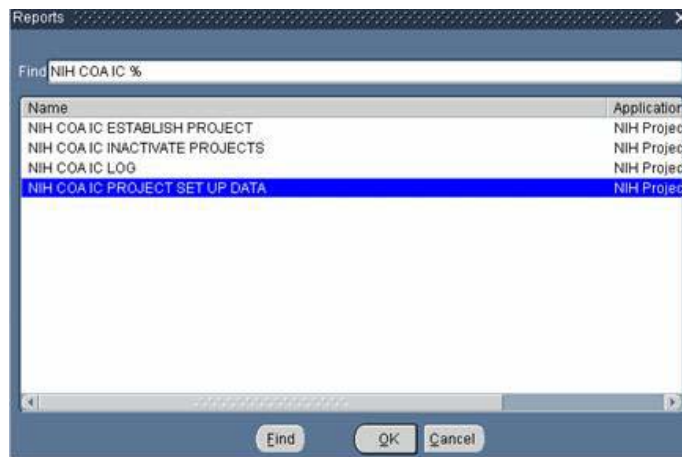
4. Select **Single Request** and click on the **OK** button.

Result: The **Submit Request** window will appear.



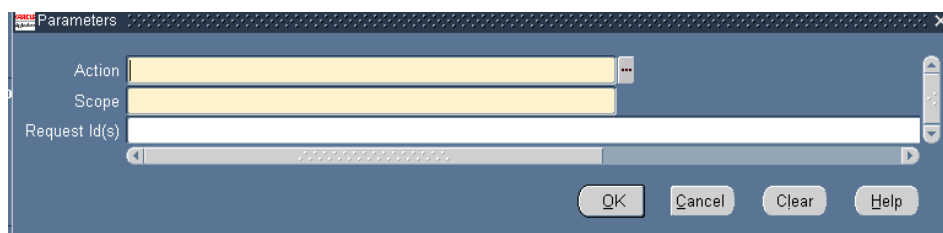
5. In the **Name** field, click on the **List of Values (LOV)** icon.

Result: The List of Values will appear.

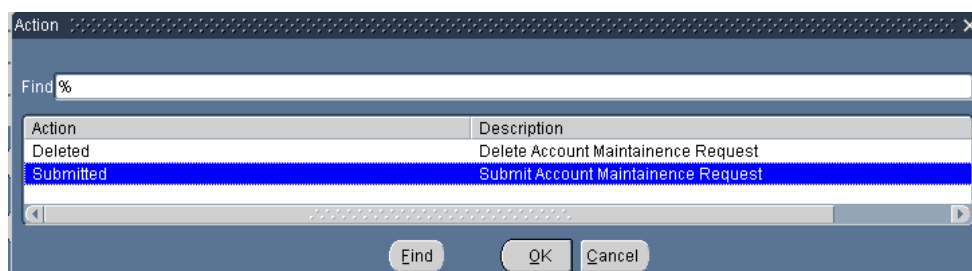


6. From the LOV, select the **NIH COA IC PROJECT SETUP DATA** value and click the **OK** button.

Result: The NIH COA IC PROJECT SETUP DATA **Parameters** window will appear.

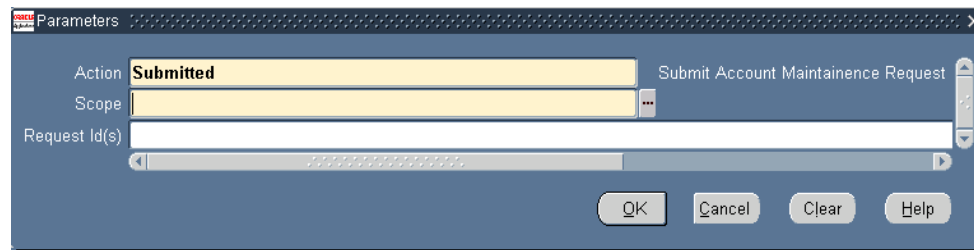


7. Click on the LOV for the Action field.



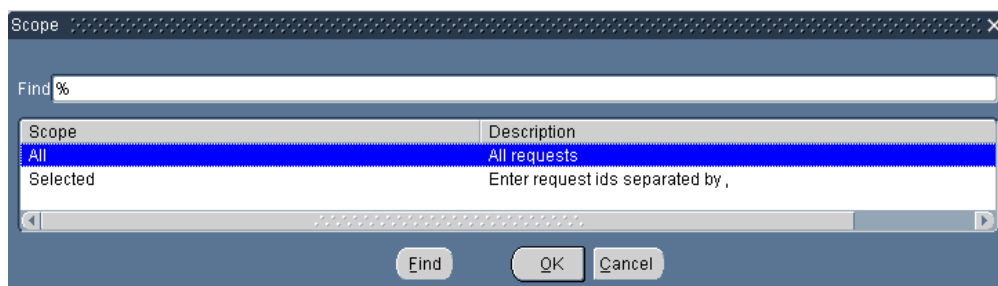
8. Select **Submitted** from the LOV if you want to submit the pending requests, or select **Deleted** from the LOV if you want to delete the pending requests.

Result: The value you selected will appear in the Action field.



The Parameters dialog box is shown. It has a title bar with a close button. Inside, there are three fields: 'Action' with a dropdown menu showing 'Submitted', 'Scope' with a dropdown menu showing '...', and 'Request Id(s)' with a text input field. To the right of the 'Action' field is a label 'Submit Account Maintenance Request'. At the bottom right are four buttons: 'OK', 'Cancel', 'Clear', and 'Help'.

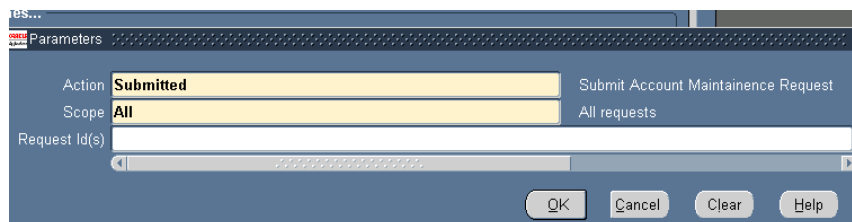
9. Click on the LOV for the Scope field.



The Scope dialog box is shown. It has a title bar with a close button. Inside, there is a 'Find %' search field. Below it is a table with two columns: 'Scope' and 'Description'. The table has three rows: 'All' (highlighted in blue), 'Selected', and 'Enter request ids separated by ,'. At the bottom are three buttons: 'Find', 'OK', and 'Cancel'.

Scope	Description
All	All requests
Selected	Enter request ids separated by ,

10. Select **All** to submit all pending requests, or choose **Selected** to submit only those requests you select.



The Parameters dialog box is shown again. The 'Scope' dropdown menu now shows 'All' instead of '...'. The 'Request Id(s)' field is still empty. The 'Action' field remains 'Submitted'. The buttons at the bottom are 'OK', 'Cancel', 'Clear', and 'Help'.

11. If you chose Selected, you will need to enter the specific Request Ids you want to submit in the Request Ids field.

12. When you have finished completing the Parameters screen, click on the OK button.

Result: you will return to the Submit Request window.

Submit Request

Run this Request...

Name

NIH COA IC PROJECT SET UP DATA

Parameters

Submitted:All:

Language

American English

Copy...

At these Times...

Run the Job

As Soon as Possible

Schedule...

Upon Completion...

☒ Save all Output Files

Notify

Print to

noprint

Options...

Help (E)

Submit

Cancel

13. Click on the **Submit** button to submit your new project request.

Result: The Request window will appear, listing your latest request at the top. You may want to make a note of the request number for tracking purposes.

Requests

Refresh Data Find Requests Submit a New Request...

Request ID	Name	Parent	Phase	Status	Parameters
99555	NIH COA IC PROJECT SE		Completed	Normal	Submitted, All,
99554	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99553	NIH COA IC INACTIVATE		Completed	Normal	35482, 12-NOV-2002,,
99552	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99551	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99550	NIH COA IC PROJECT SE		Completed	Normal	Submitted, Selected, 99548
99549	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99548	NIH COA IC INACTIVATE		Completed	Normal	35495, 24-NOV-2002,,
99547	NIH COA IC LOG		Completed	Normal	1350, P, IC LOG, ,
99546	NIH COA IC PROJECT SE		Completed	Normal	Submitted, All,

Hold Request View Details... View Output

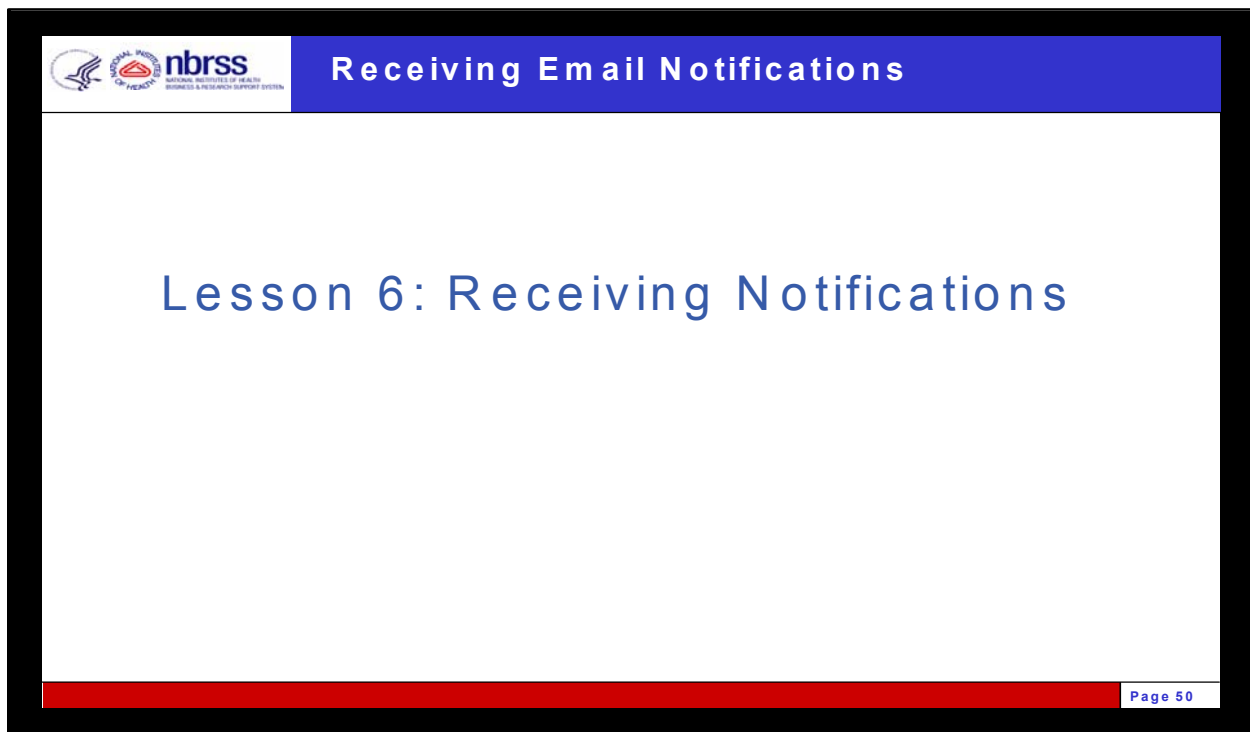
Cancel Request Diagnostics View Log...

14. Click on the **Refresh Data** button until the Phase value for the request changes to completed.

Result: Your pending request has been submitted to OFM.

End of activity

Receiving Email Notifications



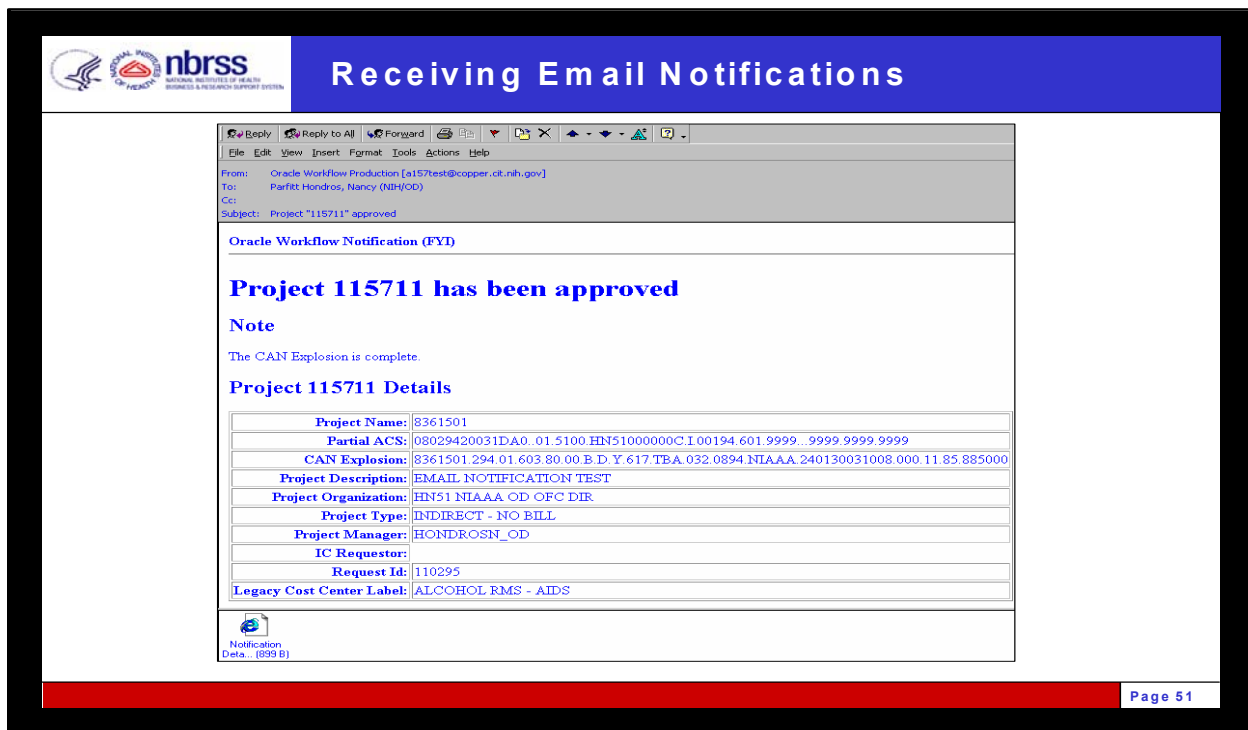
The screenshot shows a presentation slide with a black border. At the top left is a logo for the National Institutes of Health (NIH) and the National Business Research Support System (NBRSS). The logo includes the text 'NATIONAL INSTITUTES OF HEALTH' and 'NBRSS NATIONAL BUSINESS RESEARCH SUPPORT SYSTEM'. To the right of the logo is a blue header bar with the text 'Receiving Email Notifications' in white. The main content area is white and contains the text 'Lesson 6: Receiving Notifications' in blue. At the bottom right, there is a red bar with the text 'Page 50' in white.

Receiving Email Notifications

Lesson 6: Receiving Notifications

Page 50

Receiving Email Notifications



- Once OFM establishes a Project, the Project Manager and the Requestor will receive a notification that the new Project has been created and approved.
- If your email address in the NIH Enterprise Directory (NED) is correct, the notification will be emailed to this address automatically.
- If you do not know how to verify your email address with NED, you can contact the CIT Technical Assistance Support Center on 4-6248 or email them at <mailto:tasc@nih.gov>.
- It is not necessary to click on the attached notification icon. This is required by the system to close the notification and generate the email. It will tell you there is an error. **IGNORE this message!**
- Requestors may receive an additional email notification when OFM completes the NIH COA OFM Project Setup step.

Pulling Up Oracle Notifications

The screenshot displays the NBRSS Oracle Notifications interface. At the top, there is a header with the NBRSS logo and the title "Pulling Up Oracle Notifications". Below this, the interface is divided into several sections. On the left, there is a "Functions" tab and a "Documents" tab. Under the "Functions" tab, there is a "Notifications" section. In the center, there is a "Top Ten List" section. Below the "Top Ten List" section, there is a "Worklist - Requestor2" window. This window contains a table with the following columns: Select, Priority, Type, From, Subject, Sent, and Due. The table contains one row of data: a checkbox in the "Select" column, an empty "Priority" column, "NIHFA Project Approval" in the "Type" column, an empty "From" column, "Project \"115126\" approved" in the "Subject" column, "15-NOV-2002" in the "Sent" column, and an empty "Due" column. Below the table, there are "Close" and "Reassign..." buttons. The interface also includes a "Worklist" button and a "Worklist" icon. The bottom right corner of the screenshot shows "Page 52".

- If NED does not contain your correct email address, you will need to access notifications through Oracle.
- Click on the Notifications function and click on the **Open** button or double click on the Notifications function.
- Click on the link of the project notification you would like to view.

Pulling Up Oracle Notifications

Detail notification for Requestor2 - Microsoft Internet Explorer

Address: http://pyrite.ct.nh.gov:2015/pls/a15/r151/wfa_html_detail_md=CUU

Notification Details

To: Requestor2, Sent: 15-NOV-2002 11:59:32
Subject: Project "115126" approved

Project 115126 has been approved

Note
The CAN Explosion is complete.

Project 115126 Details

Project Name:	8460402
Partial ACS:	08024320031DA0.01.N100.HNN1000000C.E.00202.005.N020...9999.9999.9999
CAN Explosion:	8460402.243.01.114.10.00.X.D.N.102.TBA.042.0843.NIA.240130031008.866.16.8.82N000
Project Description:	INDIRECT NO BILLING TEMPLATE
Project Organization:	HNV12 NIEHS OD OM OFFICE OF MANAGEMENT
Project Type:	INDIRECT - NO BILL

[Return to Worklist](#)

[Comments](#)

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- The Requestor and Project Manager will see the notification details